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ABSTRACT

This paper is one of a group that describes the research methodology for an evaluation of individually guided education (IGE) in American elementary schools. The paper covers the first phase activities from solicitation of participants (April 1977) through preparation of final data tapes for the structural equations analysis (September 1978). Topics include procedures for solicitation of participants, within-school arrangements for participation, materials and packaging, data collection procedures, and comments from participating schools. A lengthy appendix contains samples of correspondence with participants, evaluation materials, and specification of data problems. (Author/JM)

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Working Paper No. 258

CONDUCT OF THE STUDY: PHASE I OF THE IGE EVALUATION PROJECT

by

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Report from the Project on
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- providing assistance to educators which helps transfer the outcomes of research and development to improved practice in local schools and teacher education institutions

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Abstract

Described in this paper are details of arrangements for Phase I of the Wisconsin Research & Development Center's IGE evaluation. The time period is from solicitation of participants (April 1977) through preparation of final data tapes for the structural equations analysis (September 1978). Topics include procedures for solicitation of participants, within-school arrangements for participation, materials and packaging, data collection procedures, and comments from participating schools.

Introduction

The purpose of the IGE Evaluation Project was to gain a more comprehensive view of the system's operation and effectiveness. The basic objective of the IGE evaluation was to identify features of IGE schooling that contribute to the success of instruction, especially in reading and mathematics. The identification of such features is critical in evaluating IGE as an educational system; it is also an activity that is integral to developing an understanding of schooling in general.

Certain features of IGE schooling have been reputed to be keys to IGE success. Phase I examines the extent of implementation of the essential features among IGE schools, and assesses the effectiveness of that implementation. As a large sample study, Phase I was designed to provide the basic information about IGE schooling. It was intended to provide a functional understanding of IGE features, processes, and outcomes by relating a broad scope of variables in an interpretive manner:

1. to determine the degree to which the seven components of IGE have been implemented in IGE schools;
2. to describe the implementation of IGE components in terms that can be related to means of instruction--particularly in reading and mathematics--then to examine the relationship of such implementation to means of instruction;
3. to describe the implementation of IGE components in terms

that can be related to staff outcomes, then to ascertain the relationship between this implementation and staff outcomes;

4. to describe the implementation of IGE components in terms that can be related--presumably by way of the means of instruction--to pupil outcomes such as reading and mathematics achievement, to selected cognitive skills, and to aspects of personality development, then to ascertain the relationship of component implementation to those pupil outcomes.

The means of instruction and the outcome variables of this study are influenced by multiple causes that operate simultaneously. Since causal relationships are easier to study when considered in isolation, most studies examine only one or a few causal relationships. With respect to IGE, simple comparisons between IGE as an undifferentiated package and one or a few other educational alternatives provide little information about specific features and processes that occur in IGE schools. Phase I, therefore, examines simultaneously relationships among the network of variables believed to influence means of instruction, staff outcomes, and pupil outcomes--thereby advancing our understanding of each IGE feature and the network as a whole.

Much of the work has been completed in Phase I. A plan was developed which identified categories of variables which could be reasonably examined in IGE schools (Romberg, 1976). Instruments were chosen in relationship to that plan (Stewart, 1977). (It should be noted that we

were faced with a vast array of instruments which had been used in prior research on aspects of IGE. Although some adaptations were made in existing instruments, instrument development was not an aspect of the IGE Evaluation Project. This procedural requirement accounts for some of the problems faced by schools using the instruments; that is, the instructions varied, there was considerable redundancy of questions, etc.) The sample of participant schools was selected (Price, 1977). The data were collected and organized. This working paper describes the details of the conduct of that data gathering procedure. The specification and scaling of variables are complete and described in a set of 15 technical reports (Price, Janicki, Howard, Stewart, Buchanan & Romberg, 1979). Documents are now in preparation explaining the logic of the structural methods analytic approach and details of the use of that approach on the data.

This paper describes the conduct of Phase I during the time period between selection of the initial sample (spring 1977) and the first report of results to the participants (summer 1978). Data collection actually occurred in October 1977 in a majority of the 162 participating schools. Described here are the methods used for enlisting participants as well as the planning, management, and processing aspects of the data collection effort.

Solicitation of Participants

After the population of eligible schools had been identified and the sample drawn, a process was initiated to enlist the cooperation of the schools. The process involved solicitation by mail and by telephone with status reports sent periodically to persons associated with the IGE state networks.

Method

Eligible participants were the 768 nationwide schools that not only responded to the Spring 1976 IGE Schools Questionnaire but also enrolled second and fifth grade students. Information from the Questionnaire was used to construct seven stratification variables which are described in Working Paper No. 223, Sampling for Phase I of the IGE Evaluation (Price, 1977). Stratified random sampling was employed to select the initial sample of approximately 300 schools, the amount sought for the planned Phase I analysis. It was thought that 75% to 80% of the schools first contacted would agree to participate. Therefore, the initial sample was extended to include 399 schools--302 schools which closely approximated the population of 768 from which it was drawn, plus 97 additional schools to ensure that at least 50% of each of the 64 stratifying clusters was represented.

The request for participation was mailed to the 399 schools in early April 1977. Each school received a set of the following materials which are reproduced in Appendix A: an invitation letter, a six-page overview of the IGE Evaluation Project, and a Reply Form. The invitation letter briefly described

each of the four evaluation phases, summarized the Phase I tasks and the staff and students involved, and outlined the means of compensation for participation. The Overview included background information, the structure of the evaluation plan, and more details about each of the four phases. A postage-paid return envelope was provided for the Reply Form on which schools were to indicate their decision regarding participation. If the reply was affirmative, they were asked to give the enrollment numbers for their current first and fourth grade students and to indicate the number of regular, academic units to which these students would be assigned as second and fifth graders for the 1977-78 school year. The invitation letter suggested that schools share the information they had received with their local Central Office personnel since the Center did not have ready access to these names or addresses.

The reply rate for the first mailing was slower and less positive than had been anticipated. Therefore, it was decided that invitations to participate should be extended to the remainder of the population; request materials were sent to these 359 schools in late April 1977.

Telephone Contact. Because the response rate and participation status continued to be quite disappointing, a person was hired by the Center to telephone the schools from whom we had not yet received Reply Forms. The process of telephoning schools began in early May and continued into early June. Schools to which the early April mailing had been sent were telephoned first, and schools to which the late April mailing had been sent were telephoned last. End-of-year school closings were imminent at the time the latter group was being

telephoned. Therefore, contact with this group was directed to schools (1) in the stratifying clusters with low acceptance rates, and (2) in states with low response rates.

The protocol for telephone contact included the following questions: (1) Had the school received the invitation materials? (2) Did they have questions about the evaluation that were not covered in these materials? (3) Had they made a decision yet regarding participation? A surprisingly large number reported that they had never received the materials, even though our mailing address for them was correct. A second set of invitation materials was sent to these schools as well as to schools that reported having misplaced or lost the information. There were few unanswered questions about Phase I itself. However, all of these schools had received from the Center the 1977 IGE Schools Questionnaire and a Staff Development Needs Questionnaire in close proximity to the Phase I materials. Furthermore, several had been contacted by a doctoral candidate at the Center who was requesting their participation in his dissertation research. Confusion was often expressed by the schools regarding just what they were being telephoned about. Verbal replies concerning participation were received as well as requests to be called back or indications that they intended to respond.

IGE State Networks Contact. People associated with each state's IGE Network--state coordinators, SICC chairpersons, liaison, or contact persons--had been informed of the Center's IGE Evaluation Project at various meetings held prior to April 1977. The Center asked the state networks group to assist

in encouraging schools to participate and sent the group periodic progress reports. Appendix B duplicates, in chronological order, the correspondence associated with this contact source.

Reasons Given for Nonparticipation

Although we did not solicit reasons for nonparticipation, many schools offered the information voluntarily, either on the Reply Form they returned or during telephone contact. Table 1 provides a comprehensive list and the number of schools that cited each as the primary reason for being unable to cooperate in Phase I. Budget cuts at state or local levels and lack of Central Office support were given most frequently by schools as reasons for dropping the IGE program (1). Declining enrollments contributed to school consolidation and closing, accounting for reasons (2) and (4). Principals were hesitant to commit their schools to Phase I when a change in administrative personnel was anticipated (3). Reasons (7) through (10) relate to the requirements entailed in Phase I participation.

Table 1

Reasons Given for Nonparticipation (Spring 1977)

Number of Schools		Reason Given for Nonparticipation
32	(1)	No longer IGE or in process of phasing out IGE program
14	(2)	No longer enrolls both grades 2 and 5
18	(3)	New principal
9	(4)	Building being closed
10	(5)	Local central office did not give approval
10	(6)	Local conditions such as desegregation, union interference, staff reluctance, large staff turnover, high student mobility
3	(7)	District-wide student achievement testing at the same time as Phase I
15	(8)	Already involved in too much student testing
13	(9)	Already participated in too many research projects, evaluations, etc.
15	(10)	Involved in too many other commitments
137	Total	

Final Sample

Although the original Phase I population was 768 schools, the amount of missing data on the 1976 IGE Schools Questionnaire was extensive for seven of the schools. Becuase of the missing data, these seven schools could not be classified according to the stratifying variables (Price, 1977). Prior to the first mailing of invitations, the population was further reduced when three schools indicated on the 1977 IGE Schools Questionnaire that they were no longer using IGE. Therefore, the number of schools to which Phase I invitations were actually sent totaled 758.

Information in Table 2 shows the Phase I reply status for the 758 schools by mid-summer when the telephone contact terminated. Data for the three reply categories are given for schools in reference both to invitation date and to method of contact by the R & D Center: mail only, or both mail and telephone.

Without the telephone contact, perhaps half of the sample would not have agreed to participate. The number of schools from which we received no response was distressingly high since the reply method was quite simple.

Table 3 provides a summary account of the reduction from the original population to the final Phase I sample. As of mid-summer, 204 schools had agreed to participate. By fall, however, 42 schools--explanation categories (5) and (6)--had dropped out, leaving the final sample size at 162.

Summary descriptive characteristics of the Phase I schools--date IGE implemented, grade range, number of students, and pupil demography--are contained in Results of IGE Evaluation: Phase I--Report 1: Descriptive Statistics for Staff Questionnaires and Student Tests (Stewart, Klopp, & Buchanan, 1978). Data are presented in Table 4 that characterize the Phase I sample by state.

Table 2

July 1977 Phase I Reply Status

According to Method of School Contact

Invitation date	Reply category	Method of School Contact by Center: Mail only N	Mail only %	Mail and telephone N	Mail and telephone %	Grand Total N	Grand Total %
Early April	Accepted	57	36.5	74	30.4	131	32.8
	Declined	88	56.4	128	52.7	216	54.1
	No response	11	7.1	41	16.9	52	13.0
	Total	156	100.0	243	100.0	399	99.9
Late April	Accepted	45	17.0	28	29.5	73	20.3
	Declined	73	27.7	49	51.6	122	34.0
	No response	146	55.3	18	18.9	164	45.7
	Total	264	100.0	95	100.0	359	100.0
Combined	Accepted	102	24.3	102	30.2	204	26.9
	Declined	161	38.3	177	52.4	338	44.6
	No response	157	37.4	59	17.4	216	28.5
	Total	420	100.0	338	100.0	758	100.0

Table 3

Summary of Phase I Population Reduction to Final Sample

Number of schools	Reduced by	Explanation
768		Original Phase I population from which the sample could be drawn.
	7	(1) Never invited because extent of missing data on the 1976 IGE Schools Questionnaire prevented their assignment to a stratifying cluster
	3	(2) Never invited because they had dropped the IGE program
	216	(3) Never responded to invitation to participate
	338	(4) Declined invitation to participate
	13	(5) Dropped out before data collection was initiated
	29	(6) Dropped out after data collection was initiated
606		Sum of schools in categories (1) through (6)
162		Final sample that participated in the October 1977 data collection

Table 4

Some Characteristics of the Phase I Sample by State

State (N = 26)	Population Invited N (1)	Population Invited % (2)	Schools in Phase I Sample - Participation Rates N (3)	% OF State (4)	% OF Sample (5)	Originating agency (N)* R&D (6)	/I/D/E,A/ (7)	Both (8)	Funding (N) Public (9)	Private (10)
MA	14	1.8	1	7.1	.62	1	0	0	1	0
RI	4	0.5	1	25.0	.62	1	0	0	1	0
NH	3	0.4	1	33.3	.62	1	0	0	1	0
CT	31	4.1	6	19.4	3.70	6	0	0	6	0
NJ	30	4.0	6	20.0	3.70	3	0	2	4	2
NY	10	1.3	3	30.0	1.85	2	1	0	3	0
PA	6	0.8	0	0.0	0.00	0	0	0	0	0
VA	13	1.7	3	23.1	1.85	1	2	0	2	1
SC	25	3.3	3	12.0	1.85	1	1	1	3	0
GA	4	0.5	1	25.0	.62	0	1	0	1	0
FL	7	0.9	1	14.3	.62	0	1	0	0	1
KY	13	1.7	3	23.1	1.85	1	1	1	3	0
OH	56	7.4	11	19.6	6.79	0	7	4	10	1
IN	18	2.4	5	27.8	3.08	4	1	0	5	0
MI	29	3.8	6	20.7	3.70	2	4	0	4	2
IA	46	6.1	16	34.8	9.87	1	14	1	10	6
WI	178	23.5	43	24.1	26.54	25	5	13	43	0
MN	41	5.4	8	19.5	4.94	2	3	3	8	0
SD	14	1.8	2	14.3	1.23	0	2	0	2	0
IL	80	10.5	20	25.0	12.35	12	7	1	13	7
MO	4	0.5	2	50.0	1.23	2	0	0	2	0
NE	14	1.8	4	28.6	2.47	4	0	0	4	0
TX	46	6.1	5	10.9	3.08	1	4	0	4	1
CO	31	4.1	4	12.9	2.47	0	1	3	4	0
UT	11	1.4	2	18.2	1.23	1	0	1	2	0
CA	30	4.0	5	16.7	3.08	4	0	1	4	1
Total	758	99.8**	162	-	99.96**	75	55	31	140	22

* Total N is 161 because originating agency for one school is unknown.

** Totals sum to less than 100.0% due to rounding.

The number of schools listed for a state in column 1 does not equal the total number of IGE schools in that state; it equals only the number that met the criteria of eligibility (Price, 1977, Chapter III) and were therefore invited. In terms of population range, New Hampshire has the lowest number of schools that were eligible, while Wisconsin has the highest. Wisconsin also has the highest number of participants, representing 26.5% of the Phase I sample (column 5). The ratio of participating to invited schools (column 4) is highest for Missouri (50%) and is lowest for Pennsylvania (0%). Overall, the participation ratios in column 4 range from 10% to 29% for 20 of the 26 states. A multivariate comparison between the participants and nonparticipants will be made to test the hypothesis of no difference between groups (Price, 1977).

Data in columns 6, 7, and 8 show the number of schools that claim either the Wisconsin R & D Center, or the Institute for Development of Educational Activities (/I/D/E/A/), or both, as their originating IGE agency. The Wisconsin R & D Center is the originating agency for 46.3% of the sample, /I/D/E/A/ for 34.0%, and both agencies for 19.1%. Columns 9 and 10 list the number of public and private schools in the sample. A majority are public schools (86.4%). In the nine states with participating private schools, 21 are Catholic and one is a private academy.

Arrangements for Participation

As schools agreed to participate in Phase I, follow-up materials (Appendix C) were sent so that the required advance work could be accomplished for the October data collection. The advance work included: (1) identifying the units in which the grade 2 and grade 5 student tests would be administered for schools that reported having more than one unit to which these students

would be assigned, (2) obtaining school staff size and organizational information, (3) obtaining the names of students to be tested, (4) arranging these students into test groups, and (5) telephoning schools where student enrollment in the test unit(s) was less than 24.

Grade 2 and Grade 5 Units

Budget considerations required that the student data for each school be collected in one grade 2 unit and in one grade 5 unit. Information about the number of units to which these students would be assigned was requested on the Phase I Reply Form returned by the schools. Those that reported having more than one unit at either or both levels were telephoned so that the unit(s) in which the student tests would be administered could be identified.

Of the final 162 participating schools, 14 had more than one unit at grade 2, 7 had more than one unit at grade 5, and 34 had more than one unit at both grades 2 and 5. The unit with the highest proportion of second (fifth) graders was selected whenever possible. Where the proportions were the same for two or more units with the same grade, the building principal was asked to identify the unit that was most typically IGE, had the more cooperative staff, or would have the highest proportion of continuing staff. These were the four criteria, then, that were applied to select the test units in the schools that assigned their second (fifth) graders to more than one academic unit.

Eligible School Staff

Some of the Phase I questionnaires were to be completed by the school's entire professional staff, while others were to be completed only by staff of the units in which students would be tested. A person was considered eligible for participation if he or she was regularly assigned to the school or test unit at least one-third time in both the 1976-77 and 1977-78 school years. In

addition, for the two units studied, only unit staff directly involved in planning for instruction in reading or mathematics or language arts responded to the questionnaires.

The Phase I Staff Information Sheet (Appendix C) was completed by schools and the information keypunched so that the evaluation staff would know the quantities of questionnaires to prepare, package, and ship to each school. The staff position of instructional aide presented special problems, because the aide position is so variable among schools. Since we didn't know how to include all instructional aides and omit all clerical aides, it was decided that no aides would be asked to complete questionnaires.

Student Test Groups

Schools were requested to prepare Roster Forms (Appendix C) for the students who would be tested, even though it was known that some problems would result--for example, a proportion of the currently-enrolled students would not return, schools with high mobility rates would prefer to wait with the lists until fall, and some schools would inevitably send lists for the wrong grade levels. To wait until September to obtain the information, however, would provide too little lead time for keypunching the student names, random assignment of students to test groups, and packaging of materials by test group for shipment to the schools.

Student names were provided by a majority of the schools. In a few cases, state law forbids students to be identified by name, so schools assigned code numbers to students, kept a master list, and sent us either the code numbers or student initials. For all schools, a 3-digit ID number was assigned to each student, and student names or codes and IDs then keypunched. It was decided not to ask schools to designate on the Roster Forms students who were

considered learning disabled, since definition of the term would most likely vary from school to school. Instead, we asked for all student names. The identification of cutoff scores on the Short Form Test of Academic Aptitude (SFTAA), administered to all students in Phase I, was the method used to distinguish these students.

The student tests selected for Phase I (Stewart, 1977) were assigned to groups so that the testing time required for any one student would not exceed two hours. This assignment of tests to groups meant that the SFTAA was taken by all students, while the CTBS Reading and Mathematics achievement tests, the Self-Observation Scales (self-concept), the Children's Locus of Control (self-direction), and the Concept Attainment Abilities tests (Grade 5 only) was divided among the groups. Four test groups were needed at both grades 2 and 5 to keep within the two-hour time limit for each student.

A computer program named $ROSTER was written to randomly pre-assign students to test groups and generate the resulting lists for each school. Students were assigned so that the groups within grade and school were as equal in size as the enrollment permitted. The evaluation design set 50 as the maximum number of students to be tested at each level and required a test group to have at least 6 but no more than 13 students. A school with exactly 50 grade 2 (grade 5) students, for example, had two groups of 12 students each and two groups of 13 students each. Schools with more than 50 students at a level were provided with a list of test alternates who could serve as substitutes, if needed. The test alternates list was generated so that names of the remaining students were not in alphabetical order.

Since the minimum test group size was 6, units with fewer than 24 grade 2 (grade 5) students had fewer than 4 groups. A school with 21 grade 2

(grade 5) students, for example, had three groups of 7 students each. The one, two, or three groups generated on the basis of enrollment were assigned additional tests so that the same student data could be gathered from every school, regardless of enrollment size.

Units with Low Student Enrollments

Table 5 shows the number of schools that had fewer than 24 students in the grade 2 (5) test units, the number of test groups in these units, and the average testing time required per group. Since the amount of testing time required for four groups at grade 2 was approximately 90 minutes, a reduction to three groups still did not exceed the 120 minutes (2-hour) time limit.

The schools with low student enrollments were telephoned as personnel returned for the fall opening in order to verify the re-enrollment of students assigned to each group. If a certain number were not returning, for example, regrouping into still fewer groups would be necessary. A more important reason for calling, however, was to ask whether they were agreeable to the additional testing time needed. They all responded affirmatively.

Table 5

Test Arrangements for Units With Fewer Than 24 Students

Grade	Number of test groups		Number of schools	Average testing time per group*
2	1		2	231
	2		5	131
	3		15	98
		Total	22	
5	1		1	335
	2		7	186
	3		6	137
		Total	14	

*in minutes

Evaluation Materials

Instrumentation for Phase I included self-report questionnaires for staff groups and standardized tests of academic aptitude, standardized achievement, and personality development (self-concept, self-direction) for students. Cognitive ability tests, developed at the R & D Center, are a set of additional tests that were administered to the grade 5 students. Project Paper 77-1, Instrumentation for Phase I of the IGE Evaluation, (Stewart, 1977) associates the assessment materials selected for the evaluation with the type of variable measured--support system, student and staff background, means of instruction, student and staff outcomes.

Staff

Questionnaires for the staff component of the evaluation were based primarily on several existing instruments which were modified in content or format to meet the requirements of IGE terminology and certain technical constraints--such as machine-readable response forms. A detailed discussion of the content and original source of each instrument as well as its relationship to the variables of interest in Phase I appears in Stewart (1977).

The instruments were printed in three questionnaire booklets for distribution according to respondent group: the Instructional Improvement Committee and principal, the grade 2 and grade 5 test units, and all members of the professional staff. One instrument, the Verification Copy of the Spring 1977 IGE Schools Questionnaire, was provided separately for the principal. Machine-readable response forms were developed to accompany each questionnaire booklet. A booklet, response form(s) and pencil were packed in an individual envelope preprinted with identification numbers and directions for distribution, completion, and return by the three respondent types. The identification number

scheme provided individual anonymity and yet allowed the evaluation staff to identify members of the three respondent groups. Since some staff were members of more than one group, the IDs were also used to match response forms belonging to a single person. The ID numbers and quantities of staff materials were based on computer generated summaries of the Staff Roster forms received from schools in spring 1977 or in a few cases early in the fall.

The time required for an individual staff member to complete the questionnaires varied according to the number of respondent groups to which he or she belonged. Since the unit leaders of the grade 2 and 5 test units were usually members of all three respondent groups, they needed to invest the greatest amount of time--245 minutes. The estimated working time for each booklet is:

Instructional Improvement Committee Questionnaire	25 minutes
General Staff Questionnaire	100 minutes
Unit Questionnaire	120 minutes

General Staff Questionnaires. Every professional staff member assigned to the school at least one-third time during both the 1976-77 and 1977-78 school years was asked to complete the general questionnaires. By setting these criteria, it was expected that all support personnel, such as guidance counselors and remedial teachers, would then participate in the evaluation, but that staff not yet familiar with IGE or not an integral part of building operations would not do so. Aides were not included because of the problems associated with involving instructional aides but not clerical aides.

The five questionnaires combined in the single staff booklet and estimated working times are:

Staff Background Information	20 minutes
IGE Implementation Survey	30 minutes
Job Satisfaction Survey	20 minutes
Assumptions About Conditions of Effective Schooling	15 minutes
Assumptions About Learning and Knowledge	15 minutes
	100 minutes total

On the Staff Background Information Form (Mendenhall, 1977) each staff member provides data on his or her assignment and position in the school, professional and IGE-related training and experience, professional activities, and personal information.

Responses to the IGE Implementation Survey (Klausmeier, 1976) indicate each person's judgment of local implementation of seven IGE components on a five-point scale from no implementation to ideal implementation. There are 77 statements or concepts in the survey, each related to one of the following components: Multiunit Organizational Administrative Arrangements (MUS), Instructional Programming for the Individual Student (IPM), Curricular Programs (CURR), Evaluation for Decision-Making (EVAL), Home-School-Community Relations (HSC), Facilitative Environments (ENV), and Continuing Research and Development (R&D).

The Job Satisfaction Survey (Mendenhall, 1977) measures eight aspects of job satisfaction on a five-point scale ranging from not satisfied to very satisfied. The eight subscales represented in the 50 items are: co-workers, career function, school identification, financial aspects, working conditions, pupil relations, community relations, and administration.

Staff members are asked to indicate the relative need for each condition

listed in a set of 28 statements called Assumptions About Conditions of Effective Schooling. The statements are derived from IGE literature which defined desirable conditions for teaching and learning (Lipham & Fruth, 1976). Responses are on a five-point scale from strongly disagree to strongly agree.

On the last instrument in the General Staff Questionnaire booklet, Assumptions about Learning and Knowledge (Barth, 1971), school personnel report their feelings about a set of 28 statements related to open education. Response choices again range from strongly disagree to strongly agree on a five-point scale.

Unit Staff Questionnaires. Staff evaluation materials for both test units, grades 2 and 5 were identical. However, to insure that the two test units responded separately, the covers of the unit questionnaire booklets were printed in different colors, and both the covers and envelopes indicated grade 2 or grade 5.

All members of each test unit, except aides, were requested to respond to the questionnaires if they met the following criteria: (1) assignment to the unit at least one-third time in both the 1976-77 and 1977-78 school years, and (2) direct involvement in planning instruction for unit students in reading and/or mathematics and/or language arts. It was assumed that these criteria would allow and encourage part-time unit members such as reading specialists or learning disability teachers to respond to and yet avoid participation by personnel unfamiliar with unit operations. Aides were not included.

The three instruments in the unit questionnaire booklet and the estimated working times are:

Role of the Staff Teacher	10 minutes
Instructional Practices in Reading, Mathematics, and Language Arts	60 minutes
Instruction and Research Unit Structure and Function	50 minutes
	120 minutes total

Each unit staff member responded independently to the first two instruments, while the unit staff as a group was asked to complete the third instrument.

Role of the Staff Teacher (Ironside, 1972) pertains to the number and kind of instructional and advisor contact teachers have with students and also to teacher specialties. Instructional Practices in Reading, Mathematics, and Language Arts (adopted by T. J. Fox from DeVault, 1973) assesses four aspects of individualized instruction--rate, media, grouping, and learner assessment--separately for each of the three content areas. The Instruction and Research Unit Structure and Function Instrument (Ironside, 1972) includes unit membership, meeting schedules and reports, utilization of meeting time, and the role of instructional and clerical aides. Also incorporated in this questionnaire are questions on topics of special concern in the evaluation: record-keeping and grouping/regrouping practices, time allocations by curricular area, and number of instructional objectives.

Instructional Improvement Committee Questionnaires. If an IIC was operating in the school, members were asked to complete by consensus the Instructional (Program) Improvement Committee Structure and Function Questionnaire (Ironside, 1972). Topics in this questionnaire are membership, meeting schedule and reports of meetings, time allocation to various tasks, and development of school-wide instructional objectives in the various curricular areas. If no IIC existed or was operative in the school, the principal was asked to describe in brief narrative form on the response sheet the governing body or leadership group or person and to complete the section on school-wide objectives. The IIC booklet also included a question regarding the demographic category of the school attendance area. Categories were based on the community types developed by the National Assessment of Educational Progress project.

The verification copy of the Spring 1977 IGE Schools Questionnaire was distributed with the IIC materials. Principals were asked to verify or update the information previously provided; of particular importance were changes in the schools' organization and extent of application of the Instructional Programming Model; for example, addition of another subject area in which the IPM is applied. The estimated time required for completing both IIC/principal questionnaires was 25 minutes. Copies of all staff evaluation materials appear in Appendix D.

Students

Across the 162 Phase I schools from which student data were received, approximately 5,500 students at grade 2 were tested and 5,800 students at grade 5. Most schools tested between 24 and 50 students at each grade. These students were preassigned by the R & D Center to one of four test groups (A, B, C, or D) at each grade. Also preassigned were the tests to be administered to each group. The Short Form Test of Academic Aptitude (SFTAA) was the only test administered to students in all groups. The specific tests assigned to each group are identified in Appendix E for the two grades. Since the total time requirement was approximately 90 minutes for grade 2 students and approximately 120 minutes for grade 5 students, the tests were scheduled to be administered in three separate sessions.

Tests and Answer Documents. Listed in Table 6 are the tests administered at both grades. Test copies of the SFTAA, CTBS, and SOS were purchased from the commercial publisher; machine-scorable SFTAA and CTBS test books were used at grade 2, while reusable test books for these two measures were used with a SFTAA-CTBS combination answer sheet for grade 5. Since each CTBS Reading and

Table 6

Phase I Student Tests

Test	Grade(s)
Short Form Test of Academic Aptitude (SFTAA)[1]	2,5
Comprehensive Tests of Basic Skills (CTBS), Form S[2]	
Reading Vocabulary	2,5
Reading Comprehension: Sentences	2
Reading Comprehension: Passages	2
Reference Comprehension	5
Mathematics Computation	2,5
Mathematics Concepts & Applications	2,5
Spelling[3]	5
Self Observation Scales (SOS)[4]	2,5
Locus of Control	2,5
Concept Attainment Abilities (CAA)	
Number Series	5
Number Relations	5
Picture Class Memory	5
Remembering Classes: Members	5
Omelet	5

[1]Grade 2: Level 1; Grade 5: Level 3

[2]Grade 2: Level C; Grade 5: Level 2

[3]Administered as a CAA word fluency substitute

[4]Grade 2: Primary Level; Grade 5: Intermediate Level

Mathematics test was assigned to a specific group, students used only a portion of a test book or answer sheet.

The SOS is a self-report, group-administered instrument with empirically determined scales which measure the way children perceive themselves and their relationships to peers, teacher, and school. Form C was selected for administration, since it had been approved by the office of the attorney general of California as not containing questions about home and family. The Primary Level measures four dimensions of children's self concept: self-acceptance, social maturity, school affiliation, and self-security. Seven dimensions are measured with the Intermediate Level: self-acceptance, self-security, social maturity, social confidence, school affiliation, teacher affiliation, and peer affiliation.

The Primary Level SOS response sheet contains a series of boxes numbered from 1 to 50. Inside each box are the item number, a symbol (e.g., a pencil, a balloon) to help students keep their place, and a happy face and a sad face with "Yes" and "No" printed under each respective face. Students respond to each question, read aloud by the test administrator, by filling in the nose of either the happy face or the sad face. The questions are printed on the response sheet at the Intermediate Level, and students answer by filling in with a "Y" circle for Yes or an "N" circle for No.

Student materials for the Locus of Control (Crommwell, 1964) and Concept Attainment Abilities (CAA) tests (Harris & Harris, 1974) were printed inhouse. The Locus of Control is a scale of 22 questions. A machine-scorable response sheet was used at both grades. The response sheet was developed by over-printing on each answer sheet the scale questions as well as "Yes" and "No" response options beside specific answer circles. The evaluation staff added

an example question which provided practice for marking responses. All questions were identical for both grades with the grade 2 copy printed in larger type. The results obtained in Phase I for this test have not been used, however, because of low-reliability.

The five CAA tests are from a battery of tests that was developed as part of a previously completed Center project (Harris & Harris, 1973). Only students in grade 5 participated in that study. The CAA tests were administered to assess student cognitve skills in three categories--numerical ability, memory, and word fluency. The tests correspond to these categories as follows:

Cognitive Ability	Test
numerical	Number Series Number Relations
memory	Picture Class Memory Remembering Classes: Members
word fluency	Omelet Spelling (CTBS)

Since comparable tests are not available for grade 2, the CAA tests were given only at grade 5 for the Phase I evaluation.

Except for the Omelet test, student CAA materials consisted of a test book that included directions and sample items and a machine-scorable answer sheet. Since the Number Series and Number Relations tests were administered to the same group, both were contained in one test book, and students responded to both on one answer sheet. The Picture Class Memory and Remembering Classes: Members tests, on the other hand, were printed in separate booklets and had separate answer sheets. Copy for Omelet, an anagrams test, was overprinted on an

answer sheet; students' written responses to each item were subsequently coded on the answer sheet as either right or wrong so that the test could be machine-scored.

Test Administrator Manuals. Copy was prepared for eight Test Administrator Manuals, a separate Manual for each of the four test groups at grades 2 and 5. Copy was organized by test session, beginning with a section called, "What You Need to Know before Test Session 1." In this section an overview of the testing program and the recommended schedule were given, and the topics of test group composition, make-up testing, student identifying data, supplies, and atmosphere for testing were discussed.

In addition to the specific directions for administering the assigned test, each test session section provided information regarding preparation, completion of student identifying data, materials required, and procedures to follow after testing. The commercial publishers granted permission to reprint material from their examiner's manuals. Ancillary information from these manuals, for example with respect to testing cautions--coaching, irregularities, guessing, time limits, etc.--was included in the preparation material for each session so that the test could be administered under the conditions prescribed by the publisher.

Each manual also provided (1) instructions regarding make-up testing and return of materials; (2) record forms for entering names of students who would need make-up testing or for whom irregularities occurred during testing, and (3) a description of the tests assigned to that group. A Contents page from the Test Administrator's Manual

for grade 2 group B is reproduced in Appendix E.

At both grades, the administrator's manual for each of the four groups was self-contained, that is, it provided complete directions only for the tests assigned to that group. These manuals could not be easily used in the 25 schools which had fewer than 24 students enrolled at either or both grades, and which, therefore, had fewer than four groups to which the total set of tests could be assigned. Twelve additional manuals were prepared--six at each grade--to accommodate the one, two, or three test groups in these low enrollment schools. These groups required from three to nine test sessions to administer the total set of tests. Their manuals were assembled by collating various test session sections from each grade's four main manuals, and then making needed changes, repaginating, and duplicating.

For all schools, the coding requirements for student identifying data were kept at a minimum. Test administrators were provided with computer-generated lists that gave the name and three-digit identification number of each student in the particular test group. The three-digit ID was the only information that had to be coded on all of the student's answer documents. The number of answer documents for each student varied from two to three, depending upon the tests assigned to the group. The other coding requirement concerned student birthdate and sex, which were needed for scoring the SFTAA.

Packaging. All materials required for testing were packaged in an envelope for each test group. Most schools received eight envelopes of test materials, one for each group at each grade. Each envelope was over-printed with copy identifying the grade and group as well as a contents list of the quantity of each material enclosed and the test

session(s) for which specific materials would be needed. The copy was printed in different colors for grades 2 and 5. The R & D Center supplied No. 2 lead pencils for all students who were to be tested, since machine-scoring of the answer documents required that such pencils be used. The envelope copy of student test materials for grade 5 group B is shown in Appendix E.

Printed at the bottom of the envelope were instructions to be followed upon completion of the testing. Only the marked student answer documents and Test Administrator Manuals were to be returned in the envelopes to the Center. Return of the Test Administrator Manuals was requested so that information entered on the "Irregularities During Testing" forms could be collected and summarized. Test administrators were instructed not to return certain materials as identified in the margin on the Contents list. Schools were requested to keep the pencils and any materials that could be used again, such as the reusable SFTAA and CTBS test books that were part of the grade 5 student materials. The purpose for doing this was two-fold: it provided the schools with several copies of reusable test materials, and it eliminated a considerable portion of the materials' weight for return shipment. Where two boxes, in most cases, were required to send the staff and student evaluation materials to each school, usually only one box was needed for return shipment to the Center because of the materials that were to remain at the school.

The advance work for packing each school's student materials was accomplished in two steps. For identification purposes, mailing labels with the school's name and address were attached to the set of

usually eight envelopes per school. Then, by using a computer-generated summary listing of the student N in each group for the particular school, the quantity of each material to be packed in the envelope was entered on the Contents list. Envelope copy and contents were changed as needed to accommodate the schools with fewer than four test groups.

Data Collection

Schedule

Data collection was scheduled for the first two weeks of October with the third week designated for student make-up testing. These dates were considered far enough into the academic year to ensure fairly stable organization and smooth functioning in the schools. This also allowed time for Center contacts with schools for which there was not sufficient student and staff information to complete preparations for the evaluation.

In order to alert schools to the upcoming data collection period, two letters were sent in advance of the evaluation materials. A letter in mid-September gave a general overview of the evaluation activities and outlined the selection of IGE printed materials available as acknowledgment of participation in Phase I. About two weeks later, a second letter informed schools of the arrival date of the student test group lists and the boxes of evaluation materials. A copy of the packing list was enclosed with this letter so quantities might be prechecked against staff and student rosters and also checked upon arrival and return. Directions for returning the materials as they would be shipped, via United Parcel Services, were included on the packing list. Also provided at this time were several copies of the Schedule of Activities suggesting dates which would most reasonably spread out the evaluation procedures over the two-week period.

The student test group lists were mailed separately along with comprehensive directions for checking them. Two advance checks were necessary. First, schools had to ascertain that only eligible students were named on the lists--that is, students who had been enrolled at the school in the preceding year, students from the correct (test) unit, etc. Second, the lists had to contain enough students to carry out the testing--that is, 6 per test group. Detailed instructions were given for dealing with situations in which there were not 6 students per group, such as utilizing the alternates' lists or moving students from one list to another. In special cases in which it was impossible to have 6 students in a group due to low enrollments, schools were asked to call the Evaluation staff for assistance in regrouping the students into fewer than 4 test groups. The latter cases are further discussed in the Data Collection Problems section of this report. Copies of all pre-data collection correspondence and enclosures appear in Appendix F.

Shipment

The evaluation materials were shipped about two weeks preceding data collection. United Parcel Service (UPS) was used because of its dependability, speed, cost, and return service. Returning materials by UPS was particularly desirable as it avoided postage payments by schools and subsequent Center reimbursement, as well as avoiding the packaging requirements of U. S. mail

In utilizing UPS return service, schools telephoned (collect) the Center when the evaluation was completed and the Center then issued a UPS "call slip." This telephone contact provided a status check on the progress of the evaluation in general and, when schools failed to call in by a partic-

ular date, offered a basis for contacting them rather than simply awaiting an uncertain mail delivery.

The original UPS shipments arrived within a day or so for Midwestern schools, and within 7 to 10 days for all but a few distant school. Return service was adequate, but somewhat slower, with a few extremely delayed return shipments due to slightly inaccurate school addresses, attempted pick-ups after school buildings had closed for the day, and seemingly idiosyncratic UPS service in certain areas. In general, the mailing went quite smoothly.

Data Return

Data collection was scheduled to end by October 21. By that date about half of the 162 schools had contacted the Center requesting UPS return service. Beginning October 31, having heard from just over 100 schools, the evaluation staff telephoned all the remaining schools asking for an expected pick-up-date, if one could be designated, and encouraging schools who had not completed the Phase 1 activities to do so as soon as possible. Most of the participants were able to specify a date; however, about 12 schools were still in the midst of the evaluation and could not predict an end date. These schools were contacted frequently thereafter and by mid-November, all but one school indicated they had completed the evaluation program. Most of these delays involved staff rather than student data, so that only five schools conducted any student testing in November.

The first return shipment arrived October 19. Shipments arrived continuously and by late November, materials from just 15 of the 162 schools were still in transit. At that point, delays in return shipments were due

to factors other than noncompletion of the evaluation activities except at one school. To cite an extreme example, two schools were closed due to financial problems and the Phase I materials locked in for six weeks. For other schools, UPS was unable to pick up the materials for a variety of reasons so that duplicate call slips had to be issued, each causing a delay of at least a week. The last four schools' shipments arrived in February 1978.

Data Collection Problems

The data collection problems to be described here are those which were evident to the participating schools as well as to the evaluation staff. Other data problems associated with missing or erroneous data will be discussed in the Data Processing section.

In the correspondence prior to the evaluation activities, schools were given an evaluation staff telephone number and encouraged to call collect if problems arose prior to or during data collection. At least one staff member planned to be available to accept calls throughout this period, particularly during the week(s) when the shipments and class lists arrived and schools were setting up the evaluation. As anticipated, there was a flurry of calls at this time about a wide variety of concerns from approximately one-fourth of the schools. Most of these questions could be dealt with immediately by the evaluation staff. However, a few schools had unresolvable problems and ultimately dropped out of the evaluation as discussed in Phase I Non-Participating Schools. Some schools reported their difficulties with Phase I when they called for UPS return service. At that point, their problems could be noted for later reference but could no longer be resolved.

Data collection problems ranged from relatively minor difficulties which probably had little long term effect on the evaluation, such as schools' problems organizing Phase I materials for distribution, to major crises which almost certainly affected the Phase I results as well as the conduct of the study; an example of the latter problem is the imminent closing of a school at the time of the evaluation. The problems with data collection are represented in the following categories.

Quantity and Distribution of Materials. Since each school was sent an extensive number and variety of materials, and staff rosters and school organizational information had not been updated since spring, a certain amount of mechanical problems were expected. Such problems involved a school receiving too few or too many materials, missing items, or late materials arrival. For example, if it was not known that a school had expanded its primary unit to include grades K through 3 in addition to grades 1 and 2, then too few Unit Staff Questionnaires for the grade 2 test unit were mailed. About 20 schools contacted the Center with this problem.

There was confusion concerning the distribution of the staff questionnaires in another 20 schools. Again, this problem often reflected a new school organization requiring reorganization of staff materials and changes in ID numbers before they could be accurately handed out. Also, because certain schools had more than one unit at the grade 2 and grade 5 test levels, or a self-contained type of organization, it was not immediately clear in some schools to whom the unit questionnaires belonged. Another common query concerned the participation in the evaluation of special staff such as art teachers or learning disability teachers.

Student Test Groups. When making participation arrangements with the schools during the spring and summer, the evaluation staff was able to pre-identify 15 schools in which additional testing time would be required because of fewer than 24 students at either or both grades. Because of declining enrollments, it was anticipated that additional schools would contact the Center with this problem once they had received their Test Group Lists. Twelve schools telephoned to indicate that, after checking the lists, one or more groups did not have the required minimum of six students. Of the original 15 low enrollment schools, 7 called to indicate that enrollments had declined even further, necessitating additional regrouping. A total of 19 schools contacted the Center about problems of student test group composition. When the schools contacted the Center, they were asked whether the additional testing time required in this situation would be permissable and, since all agreed, they could be assisted immediately in regrouping the students. Revised testing materials were assembled and mailed following the telephone conversation. Related test group problems, which occurred in a few schools, involved test lists which were at the wrong grade level or crossed over unit lines. Revised lists were sent out after these schools provided new student rosters.

Evaluation Schedule. Schools had been requested to inform the Center if they needed to deviate from the student testing schedule. Twelve schools indicated minor changes in the test schedule due to Columbus Day, teachers' meetings, the principal's absence, or conflicting local testing dates. For these schools a satisfactory revised schedule was agreed upon and the evaluation proceeded without further difficulty.

There were some schools, however, in which the confluence of the Phase I activities with local or state testing or other demands caused ill-humored staff and "bleary-eyed students." One principal stated his teachers had "seven pages of budgeting" prior to Phase I and in general were overwhelmed with similar paperwork. Another principal reported that his school was involved in a state-required audit of its special education program, local standardized testing, and another research project--all within the same time period as Phase I. Since most schools agreed to participate in Phase I in late spring, all potential conflicts could not be anticipated. Those unanticipated conflicts had a negative effect on the evaluation activities.

Local Problems. Difficulties such as imminent school closings, a clerical strike, teacher strikes, ongoing teacher-union negotiations, rigid contract requirements, desegregation activities, school consolidation, and lack of administrative support for IGE affected at least 10 schools. Delays in student testing, as well as negative or incomplete staff information, were attributed to these problems.

Organization of Testing. For six or more schools, the logistics of administering the student test program were particularly trying. This was due to lack of sufficient professional staff and aides, lack of space, difficulty in regrouping children, and a narrowly-defined IGE program in schools which seemed to "do IGE" only for one subject area, usually reading and typically the Wisconsin Design. For example, in one school "it was difficult to make special provisions for space and supervision for children not being tested." In schools with these problems, the principal or a single staff member often did all of the organizing and the testing for Phase I.

This situation seemed somewhat ironic to the evaluation staff since IGE generally requires flexible staff and student utilization on a regular basis.

Time. The amount of time required for the evaluation resulted in complaints, delays, and a negative attitude toward participation in some schools. In certain cases, student time was the main consideration, particularly if students had been tested recently for another purpose. Staff time for completing the questionnaires was the primary objection in other schools. There were a few schools for which the demands of the evaluation, both in terms of time and organization, seemed so overwhelming initially that they contacted the Center to express dismay; however, in follow-up contact with these schools, it was learned that the evaluation procedures went "surprisingly well" and were not as burdensome as first believed.

Testing and Questionnaire Procedures. Procedural problems as perceived by the schools tended to be relatively minor and quite infrequent--about 10 schools asked for assistance in this. For example, one principal asked if the test groups could be "evened up;" another wanted a review of materials to be returned. Most questions were of this organizational nature. There were very few questions concerning actual details of the questionnaire completion or student test administration; this was gratifying to the evaluation staff. Of course, some procedural problems did not become evident until the data were processed. Isolated comments were received on the content of the student and staff evaluation materials. These comments will be reported in the Comments from Schools section.

Non-Participating Schools

For 29 schools, the problems associated with Phase I participation such as time commitment, or the problems unique to particular schools, as in cases of new building principals, resulted in their dropping out of the evaluation. Often the reasons for doing so are interrelated; for example extensive local testing prior to Phase I testing resulted in staff resistance. Table 7 summarizes the non-participating schools by their primary reason for failing to go on with Phase I.

Table 7

Reasons Given for Non-participation (Fall 1977)

Number of Schools	Primary Reason for Non-Participation in Phase I
9	Conflicts with local/state testing programs resulting in overtesting of students, too much teacher time and lost instructional time; use of identical tests
9	New principal
5	Local problems, such as imminent school closings, past or pending teacher strikes, extensive staff/student turnover
3	Staff resistance
2	Heavy involvement in other special projects
1	Unknown
29 TOTAL	

Data Processing

Staff

As the completed evaluation materials from each school arrived at the Center, every staff questionnaire packet was logged in to insure that a representative number of staff members in each respondent group in the school (e.g., the IIC, the two test units) had participated. Each respondent's ID number--which identified the person as a member of a particular respondent group--was also checked against his or her responses to four items in the General Staff Questionnaire concerning staff role in the school. This was done to insure that the correct ID had been assigned and that the correct questionnaire(s) had been answered; for instance, that non-test unit members had answered the General Staff Questionnaires, but not the Unit Questionnaires.

As a result of the check-in procedures, approximately one-third of the schools had to be contacted by telephone because the quantities of staff materials returned for each respondent group seemed low or did not reflect the staff organization reported in the rosters submitted to the Center in the spring. For the majority of these schools, one or two calls sufficed to validate the response rate and pattern and to prompt the return of any missing staff materials. In a few instances, however, several phone calls to the same school were necessary to attempt to complete the staff data collection. A follow-up mail reminder was also used in some cases.

It was anticipated that a small proportion of schools would need to be contacted about their returned evaluation materials (staff materials

in this case), but the need to call one-third of the schools was unexpected and is commented on. The discrepancy between the quantities of staff materials distributed, as determined by the spring staff rosters, and the actual numbers returned for each respondent group, arose because of several factors: (1) lower student enrollments caused cutbacks in staff; (2) there were more new teachers than expected especially in parochial schools; (3) the original staff rosters were inflated, particularly in terms of unit membership--for example, unit leaders were often counted once as leaders and again as teachers, and specialists such as learning disability teachers were counted in more than one unit; (4) several schools reorganized their unit structure after school reconvened in the fall; and, (5) some units existed "in name only," so that some (or even all) unit members did not respond to the questionnaires. In light of these factors, revealed after calling many schools, it can be said that a representative sample of staff members in each school responded to the staff instruments.

Despite calls and reminders, there were four schools that completed very few or no staff questionnaires, due to general staff resistance in three schools and in the fourth school because the "master teacher contract does not permit us to infringe on the time of teachers for extra work such as the questionnaires." In addition to these four schools, there were two schools for which there were no data for particular respondent groups. In the first case no IIC/principal nor grade 5 test unit data were returned, seemingly because the principal was new to the building and there were administrative difficulties with the evaluation; in the second school no data were available for either test unit because both were comprised of

entirely new staff.

When the check-in and clean-up process was completed, response forms for the 158 schools were scanned by the Testing and Evaluation Services department of the School of Education. Scanning was done in batches, beginning November 17 and continuing until the final response forms were submitted on February 6. Tapes of the responses were then provided for the Center. From listings of the data, another check of the ID numbers was carried out, as well as a survey of significant amounts of missing data for single respondents or respondent groups. The missing data were summarized in internal memos for reference purposes during subsequent data analysis (see Appendix G).

A few adjustments to the data base were made at this time; for example, data were dropped from respondents who reported being assigned less than one-third time to their building. For the two schools in which data from entire respondent groups was not available, all data were omitted from further analysis. However, these two schools were provided descriptive statistics for the segments of the evaluation they had completed.

Students

The student data were scored at three different scoring centers. Scoring at the CTB/McGraw-Hill Scoring Center of both the grade 2 and grade 5 SFTAA and CTBS was required in order to receive anticipated achievement scores. The costs of machine-scoring and reporting are integrated into the purchase price of the Self Observation Scales answer forms, which were also scored by the publisher, National Testing Service. The Locus of Control and CAA answer forms were processed locally by the Testing and Evaluation

Services department of the University of Wisconsin School of Education. Because this department would be relocating on campus, it was decided to process the Locus of Control and CAA answer documents before their move, thereby preventing any delays that might be caused by the relocation. All of a school's student data, therefore, were not processed simultaneously. The Locus of Control and CAA answer forms for all schools were processed first. Then, the SFTAA, CTBS, and SOS answer documents were processed by school before being shipped to the appropriate scoring center.

The number of answer documents to be processed for a school depended upon the number of students tested. For example, processing 180 answer forms was required, for a school in which 36 students were tested at each grade. Processing steps for each answer document involved verification of the coding for the student identifying data, instrument counts, and cleanup. Checks for the gridding of the student identifying data included making sure that the 3-digit IDs were coded in the correct columns and that birthdate and sex were also coded on the SFTAA documents. Since the 3-digit student ID was critical, the gridding of this information was checked against the Test Group List to insure that the ID was correctly coded. Other checks on the student identifying data included the darkening of light coding marks and erasure of stray marks.

Instrument checks and counts involved various steps. A particular page from a test book or a particular test area on an answer sheet was checked to make sure that no blank books or answer sheets would be processed. Each page of the grade 2 CTBS Mathematics Computation test is a separately-timed subtest. Failure to administer the entire test became clear by checking each Computation test page. The Multiplication subtest, for

example, was not given in several schools. Answer documents for each school were logged in by test group. This method permitted ready identification of answers marked in the wrong test area of an answer sheet so that responses could be transferred. School Summary Sheets for evaluation staff use were completed by entering the number of each document type for each test group by school and also by noting any test aberrations that were encountered for a school during processing.

Because of time and personnel constraints, cleanup of student marking errors--lightly-marked answers, multiple-marked items, stray marks--was restricted to only the severe cases.

The final step in processing was preparation of the answer documents for mailing to the scoring centers. This involved coding of group information, filling out header sheets, packing, etc.

A multitude of student data problems occurred, some of which became apparent during the preparation for scoring phases. For example, countless errors were detected in the gridding of the student identifying data. IDs were (1) coded in the wrong columns; (2) incorrect; or (3) marked too lightly to be machine-readable. Missing birthdates omitted sometimes for a few students and often for entire test groups, required contacting 32 schools for this information.

Other problems encountered during processing included the testing of newly-enrolled students, tests administered to the wrong groups or not administered at all, students tested in two IGE units (instead of one) at either or both grades, and data for less than six students in a group.

Additional problems arose after the test results from the scoring

centers had been received and checked. Errors for the SOS and CTBS were most prominent. On the grade 5 SOS results, for example, the school name identified with each set of output was incorrect for 59 schools. Also, the results for 17 schools indicated that the SOS response sheets for one or more students either had not been scored (14 schools), or had been scored twice (three schools). These SOS problems originated at the scoring center. Several months of communication with the scoring service were required before the Center finally received all of the corrected SOS output for these schools.

The CTBS scoring errors were of a different nature. As mentioned previously, each CTBS Reading and Mathematics test was assigned to a specific group. Since copies of each test are not available separately, students used only a portion of a test book or answer sheet. The problem was reduced somewhat at grade 2 by the availability of test books with just the three Reading tests. Not available, however, are test books with just the Mathematics tests. Partial battery test books had to be used instead. At grade 5, the reusable CTBS test books contain a battery of tests, and the SFTAA-CTBS combination answer sheet is used for administering the entire battery.

The main problem in not having custom-produced test books or answer sheets for each group was that many students marked answers for additional tests to which they had not been assigned. This occurred when students completed the assigned tests but then proceeded to continue in the test book until the test session ended. These students marked answers to tests without the benefit either of directions or the total time allowed for the test. The problem of responses to additional tests was observed by the evaluation

staff during processing, but the full ramifications were not apparent until the Center received the Class Record Sheets that were to be sent to the schools. There were many instances of either zero or very low scores reported for the additional tests started by these students. Since it was important that schools receive accurate results, student scores on the additional tests were deleted and the school Class Records Sheets were rerun by the scoring center. The number of scores deleted was 229 in 42 schools for grade 2 and 292 in 73 schools for grade 5. As happened with the SOS scoring service, it took several months before the corrected CTBS data for the schools were received; in the latter case because of a temporary overload at the scoring center. The gamut of Phase I student data problems are detailed in the Center memos reproduced in Appendix H.

Comments from Schools--Content of the Evaluation Materials

Staff Questionnaires

Although comments from participating schools were not systematically solicited, several opinions about Phase I activities were offered casually during telephone conversations and, in a few cases, formal complaints were registered by letter or phone. Those complaints concerning such general aspects as time commitment and administrative difficulties have been documented above. Here we wish to report only comments which deal specifically with the content of the evaluation materials.

The only staff instrument which prompted negative comment was the Job Satisfaction Survey. The negative comments were directed particularly

at the first 10 items which concerned staff attitudes toward the school administration which, in most schools, was the building principal alone. Several principals from one city indicated that these 10 items were "too personal," and they questioned the purpose of this part of the survey. A principal in another location was concerned about his superintendent's reaction if the results for the 10 items were reported separately. He also felt that the questionnaire was inappropriate at that time for his teachers. They were still amidst contract negotiations and a large number of their colleagues had just been cut.

A few people indicated that the staff questionnaires in general were too lengthy, difficult, and ambiguous. In particular, there were comments regarding the difficulty of responding to the portions of the questionnaires dealing with IGE from staff members who either taught in a self-contained classroom or whose school was "IGE in name only." Two isolated comments about specific instruments should also be noted: (1) sex and age are not relevant for Staff Background and (2) with regard to the Assumptions About Learning and Knowledge, "learners go through different cognitive states" and since no particular age group was stated, the respondent found the questionnaire difficult to answer.

Student Tests

The most common complaint from schools about the student evaluation materials concerned the CTBS Mathematics Computation subtest for grade 2, which includes a section on multiplication. Although from the evaluation staff's point of view, it is appropriate to administer a wide-range standardized test, including some problems many children cannot do, several teachers felt this part of the test was an unnecessarily frustrating

experience for their students. Since the three sections of the subtest (addition, subtraction, and multiplication) are timed separately, no doubt the problem was exaggerated beyond what would have been the case had the problem types been intermingled or not given in separately timed groups.

A few teachers reported that the time requirements were underestimated for administering the SFTAA, as recommended by the publisher, causing scheduling problems and student fatigue, particularly at grade 2. One teacher indicated the source of the problem was the lack of time allowed to dictate the test, rather than the students' response time, which was delimited.

The schools received the tests of self-concept and self-direction for grades 2 and 5, with both strongly positive and strongly negative reactions. One principal expressed serious reservations about the type of questions and statements contained in these instruments indicating that thoughts such as "I don't have many friends," or "My teachers are mean," may be only vague thoughts in a child and should not be brought to a surface level of thought or commitment in writing. In another school, the principal reported that "We were advised by our Administration not to administer this section of the tests(s) to our students." On the other hand two schools were extremely enthusiastic about the attitudinal measures and planned to use them locally. An incidental difficulty with the SOS tests at grade 5--negatively-stated questions--was pointed out by three schools. For example, one teacher noted that the statement "I can't be depended on," which requires the responses "Yes, I can't" or "No, I can," would be more clear to students phrased as "I can be depended on," with the responses "Yes, I can" or "No, I can't."

As might be expected at both grades 2 and 5, a few concerns were expressed about the effect of low reading skills on test performance. When possible, it was pointed out to schools that using the SFTAA as a measure of expected performance would compensate in a measurement sense for this problem, although the child's immediate feelings of frustration or failure cannot be avoided.

Gifts

As acknowledgment of their participation in the evaluation, all 162 schools were sent a copy of Individually Guided Elementary Education: Concepts and Practices, edited by H. J. Klausmeier, R. A. Rossmiller, and M. Saily. Additionally, schools were given a choice of the materials below and made selections as follows:

Gift material	Number of schools
Franklin Elementary School Simulation Series	20
The Leadership Series in IGE (any three books)	78
Individually Guided Motivation Print Materials	64

Recommendations

At various times during the period covered in this report, evaluation staff concurred that the single most useful recommendation about conducting a large-scale survey is "Don't do it." In general, participants were very cooperative, but their cooperation stemmed from interest in the results rather than from any commitment or obligation to the evaluation as an accepted part of the school program; we could not expect to be higher than

second on any school's priority list. Rarely, where the demands of the evaluation greatly exceeded local anticipation or came at a locally inconvenient time, a complaint was submitted in an unpleasant demanding manner; this is to be expected. Although we mention schools here, primarily because there were more of them than there were of any one other kind of agency to be dealt with, it is the case that each kind of agency--school, scoring service, printer, publisher--has its own idiosyncracies. We found that flexibility, tact, and persistence were required in large measure, even under what we consider to have been generally pleasant conditions of our dealing with others.

Problems were not universal and could not be solved by applying a particular decision rule. Rather, each problem would occur in only a few cases, requiring special treatment for each instance. The recommendations are derived from the scoring problems we experienced, our sometimes inadequate local contacts, and other organizational problems; the recommendations deal with procedures for anticipating and planning how to avoid problems.

Scoring Service Problems

Much custom preparation of materials was carried out: specially designed response forms were prepared for all staff questionnaires; custom test booklets or answer sheets were prepared for the Locus of Control and CAA tests. No scoring service problems were encountered with these forms processed by the University's Testing and Evaluation Service. Other scoring was carried out by commercial scoring services for their own instruments. In those cases we encountered problems. One case seems to have been an extended instance of Murphy's Law; each time one problem was solved, at

least one more surfaced. In the other case, we did not anticipate the results of a less than perfectly complete check-in of over 15,000 answer documents and then had scheduling problems at the scoring center.

Three possible alternatives have occurred to us. First, a staff member could be on site at distant scoring centers as the data were run. Second, all scoring could be done locally. Third, unless the entire stock response form is to be used, a custom form could be printed. Our activity turned out to be an adaptation of the first alternative in that we worked locally with a raw score listing supplied by the scoring service. For maximum efficiency of the scoring center, that's probably as close as a client should be. Local scoring services, though probably smaller and more flexible, would be likely to want the same distance between clients and the people doing the processing; in addition, the local service may not have a contract permitting the standard processing of instruments usually scored by the publisher, although such contracts do exist. Both the first and second alternatives permit the conditions that required perfect check-in of answer documents: students could take tests without directions or adequate time or could make random marks in other sections of the answer documents.

We did not estimate costs for custom printing, and programming at grade 2, to provide separate machine-scorable CTBS test booklets at grade 2 and special combination CTBS/SFTAA answer sheets for each test group at grade 5; rather we used stock materials for students and prepared special administrator's manuals for each test group. We have learned that the cost of using stock materials includes (1) loss of subjects (e.g., were the responses in the area for Test 6 really answers to Test 2 which the group was to have taken?), (2) extensive evaluation staff check-in-time

(e.g., did members of grade 2 arithmetic computation groups actually work on all three test pages in the middle of the booklet?), and (3) expensive and time-consuming reruns of data. Custom materials may well have been a bargain.

Local Contacts

Our sole personal contact at each school was the principal who, in some cases, may not have wanted to or had time to deal with the details of scheduling the evaluation activities and distributing and processing materials. The on-site coordination should be carried out by a school staff member who is interested in that sort of thing and does it well; the principal should choose either to do the coordination or to support someone else in that activity. Coordination should be a recognized responsibility indicating the school's agreement to participate in the study. We estimate that a total of less than two days time would have been required across the five school months of contact (April, May, September, October, November).

To make full use of on-site coordinators, one should meet with them--perhaps in a series of regional meetings--with samples of the materials in hand to describe and answer questions about the study. Situations peculiar to one site could be discussed in advance and not become problems to be solved or aberrations to be dealt with. The reasons for having particular procedures could be made clear to the schools.

In an attempt to avoid jamming already busy schedules, we did not ask schools to verify in the fall information they had provided in the spring about number of staff, school organization, etc., but we used the spring information in setting up materials shipments. Last minute local

updates, reasonable for a local coordinator to provide, would have been useful in many cases: schools would not have been surprised with more than the necessary materials and we would not have been surprised by fewer than anticipated completed forms.

A survey project that directed the same questions to all members of a particular respondent group in the school--instructional staff, administrative staff, and students--would probably not require the separate packets and directions we thought we had to provide. Although all staff were asked to respond to some questionnaires, some staff were asked to respond to additional instruments, sometimes individually and sometimes in a group. The organization of the student component of the study was also somewhat complex; students were selected from two grades and then randomly assigned to groups for testing with different instruments.

Our group consensus instruments for unit staff and for the IIC were provided in two different ways: one copy of the IIC questionnaire and the response form was labeled for the principal; all unit staff had copies of the unit questionnaire in the booklet with questionnaires to be filled out individually while only the packet marked for the unit leader contained a response form. The idea of group consensus may have been more readily obvious if multiple copies of the instrument with one response form had been provided in a single package directed, by name, to the leaders and principal. A member of the local staff could put names on packets of staff materials for individual distribution and, as mentioned above, on packages provided for group consensus. We see no need for names to be known outside the building.

Organizational Problems

The previous comments as well as information from other sections

indicate that a good deal of advanced planning is necessary. The following is a discussion of additional useful planning steps.

The schedule of fall data gathering required us to make school contacts in spring. As mentioned in other sections, crossing school years gave us some problems with changes in school administrator, staff new to the school, changes in school organization, and student transfers. Both contacts and data gathering should be scheduled for the same school year. Because data gathering was to occur in October, much information was provided to participating schools during the school opening period; there was little opportunity for questions and answers. To forestall this problem, we might have provided preliminary information about student tests and staff questionnaires soon after the initial invitation letter. As it was, we made no mailing during the summer and tried to limit the content of early fall mailings to essential information.

We should have established firm cutoff dates for return of materials and notified slow-moving participants of those dates. We don't know what this procedure might have cost in terms of lost data; however, there was some loss anyway when very late returns were incomplete, as well as much staff time spent encouraging apparently reluctant participants.

As reported earlier, existing intact instruments were used for data collection. This procedural decision cost participant time and enthusiasm. We should have done more adapting from existing questionnaires. We should have made time for an informal tryout of the packets of staff questionnaires not only for clarification but also for suggestions about shortening the questionnaires without loss of information. Ideally, the structural model would be specified early enough so that only items to be used in the analysis would be retained in the questionnaires.

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APPENDIX A

INVITATION MATERIALS SENT TO POTENTIAL PHASE I PARTICIPANTS

the
Wisconsin
Research and Development Center
for Cognitive
Learning

(608) 263-4200

the University of Wisconsin · 1025 West Johnson Street · Madison, Wisconsin 53706

April 8, 1977

Dear IGE Principal:

We at the R & D Center view Individually Guided Education as an important alternative to the way in which elementary schools have typically been organized and operated. We believe that such alternatives are essential if American education is to improve. IGE is a significant reform movement in American education, and you are an important part of that movement.

The R & D Center has been funded by the National Institute of Education to conduct an extensive evaluation of IGE. The plans for this evaluation are detailed in the enclosed Overview. Briefly, the four phases of the evaluation are as follows:

I. A comprehensive survey of 300 schools, selected on the basis of responses to the Spring 1976 IGE Schools Questionnaire, to represent the variety of degree of IGE implementation that is typical in schools.

II. A follow up on-site study of approximately 30 schools in the above sample.

III. Case studies of from six to ten exemplary IGE schools.

IV. Investigations of the effectiveness of Center curriculum products in IGE and non-IGE schools.

Phase I of the study is critical, since it is from this phase that baseline data about IGE in operation are to be collected. It is for this phase that your participation is now being requested.

To help you decide, let me inform you of what will be needed for Phase I. First, this spring (1) return the enclosed reply form indicating that you are willing to assist; (2) mail us rosters of pupils who are enrolled in the first and fourth grades in your school this spring. From these rosters we will randomly select approximately 50 students from each grade level to be tested in October. Then, in October 1977 (3) administer a testing program for the 50 students at the second and fifth grades. The students will take achievement and

ability tests provided by the Center to give us baseline student data. The amount of testing time for any one student is approximately two hours. Also in October (4) have the staff of your school respond to questionnaires about IGE. Some of the questionnaires will be for all school staff, while others will be only for the staff associated with the second and fifth grade students being tested. These are the four basic tasks that would be involved in Phase I of the evaluation project. In addition, you may be asked to help with the other phases.

The primary incentive for your school's cooperation must be the professional interest of you and your staff in IGE and your desire to know more about IGE as a system of education. However, each school participating in Phase I will receive a copy of IGE Concepts and Practices, edited by H. J. Klausmeier, R. A. Rossmiller, and M. Saily, and will have the opportunity to select additional staff development materials (approximately $25.00 worth).

You may find the Overview useful for informing others about the evaluation project. For example, we have not contacted your central office about your school's selection.

If you can assist, would you respond as soon as possible so that we can proceed with the planning steps for your school's participation in Phase I. I am asking that the enclosed reply form be returned (in the enclosed envelope) by If your reply is affirmative, my staff will then contact you about providing the information needed (rosters, etc.) to prepare for the Fall 1977 data collection.

Cordially,

Thomas A. Romberg

Thomas A. Romberg
Project Director,
IGE Evaluation Project

Enclosures

P.S. The evaluation is independent of the Center's 1977 IGE Schools Questionnaire and Staff Development Needs Questionnaire, both of which you will receive shortly.

the Wisconsin Research and Development Center for Cognitive Learning

(608) 263-4200

the University of Wisconsin · 1025 West Johnson Street · Madison, Wisconsin 53706

IGE Evaluation Project
Phase I Reply Form

ID _ _ _ _ _ _ _ _ _ _ _ _ _

ATTN: Tom Romberg

___No, our school is not able to participate in Phase I.

___Yes, our school is willing to participate in Phase I.

First Graders. Current enrollment is _____
(approximate number)

These first graders will be organized as second graders during the 1977-78 school year in

____regular, academic unit(s), learning communities
(number)

Fourth Graders. Current enrollment is _____
(approximate number)

These fourth graders will be organized as fifth graders during the 1977-78 school year in

____regular, academic unit(s), learning communities
(number)

_____
(signature of respondent)

64 the Wisconsin Research and Development Center for Cognitive Learning

(608) 263-4200

the University of Wisconsin · 1025 West Johnson Street · Madison, Wisconsin 53706

Overview of the Wisconsin R & D Center IGE Evaluation Project

by Thomas A. Romberg, Project Director

Background

For more than a decade, the primary program of the Wisconsin Research and Development Center for Cognitive Learning has been Individually Guided Education (IGE). The Center's ability to marshall human and financial resources in an attempt to restructure elementary education in the United States has been pictured as a prime example of the utility of Federal financing of educational research and development.

Today there are well over 1500 IGE elementary schools. Unfortunately, no comprehensive picture of the extent or effectiveness of IGE implementation is now available. This is not to imply that evaluations of IGE have not been done. On the contrary, one recent article reviewed approximately 50 different studies directed at evaluating various aspects of IGE; each of these studies, however, dealt with parts of the IGE system and offered only glimpses of the impact of IGE. Also, responses to the Center's 1976 IGE Schools Questionnaire clearly indicated substantial variance in affiliation, degree of utilization, use of the instructional programming model (IPM), subject matter selected for IPM implementation, staff organization, etc. Obviously, the translation of IGE into practice has taken many forms. Thus, there is a need to evaluate IGE so that both a comprehensive picture of the system in operation and its effectiveness can be determined. The picture should illuminate the features of IGE schools which have made them successful.

The design of such an evaluation is not straightforward. IGE is not a product like a washing machine to be judged simply by performance against competitors as in a consumer report. Rather it is a complex system based on theoretic and pragmatic ideas about schooling, childrens's learning, and the professional roles of school staff members. In essence, IGE is the result of a long, collaborative interplay of these ideas by various scholars and professional educators. Four principles were followed in developing the evaluation plan for IGE.

First, pupil outcomes are the basis of an IGE evaluation. As Klausmeier stated,

> Students, upon completing IGE elementary schooling, should have achieved higher than in other kinds of schools, should have achieved conceptualizing skills and other abilities which enable them to continue to learn, and also should have healthy self-concepts.

The extent to which these outcomes have been attained must be the basis of the evaluation plan.

Second, the instructional means or form of schooling is an essential aspect of an IGE evaluation. It has been fashionable in evaluation circles to concentrate on ends or outcomes and to ignore the means by which they are reached. Yet, IGE is an educational reform in part aimed at changing the means of instruction. To this extent judging the value of the means is as important as assessing outcomes.

Third, staff outcomes are important to an IGE evaluation. If changed pupil outcomes are a result of changed pupil activities, then it follows that changed means are in part a result of changed teacher activities. One established fact in IGE schools is changed staff roles. The extent to which staff changes are reflected in increased knowledge about individuals and schooling or in changed attitudes and values should also be reflected in an IGE evaluation plan. In fact, if IGE is as dynamic as is claimed, then the evolution of a staff to an increasingly professional approach to solving the problems of educating children should be evident.

Fourth, the degree to which the supportive systems of IGE have been incorporated and developed in a school must be judged. The seven components of IGE have evolved as practical features of IGE schools in order to support new instructional methods which in turn produce desired pupil and staff outcomes. It can be argued that the efficiency of an IGE school is a function of which components have been implemented and how well they are operating. In fact Klausmeier has made the following claim:

> High quality instruction is realized in IGE schools when conditions such as the following are operative: clearly defined roles and responsibilities, shared decision making, continuous pupil progress, personalized instruction, active learning, objective-based evaluation, involvement of parents and support from the community, and support by responsible education agencies.

The descriptive framework being used in this project is diagramed in Figure 1. It shows the relationships among four types of variables--support system components, pupil and staff background, means of instruction, and pupil and staff outcomes.

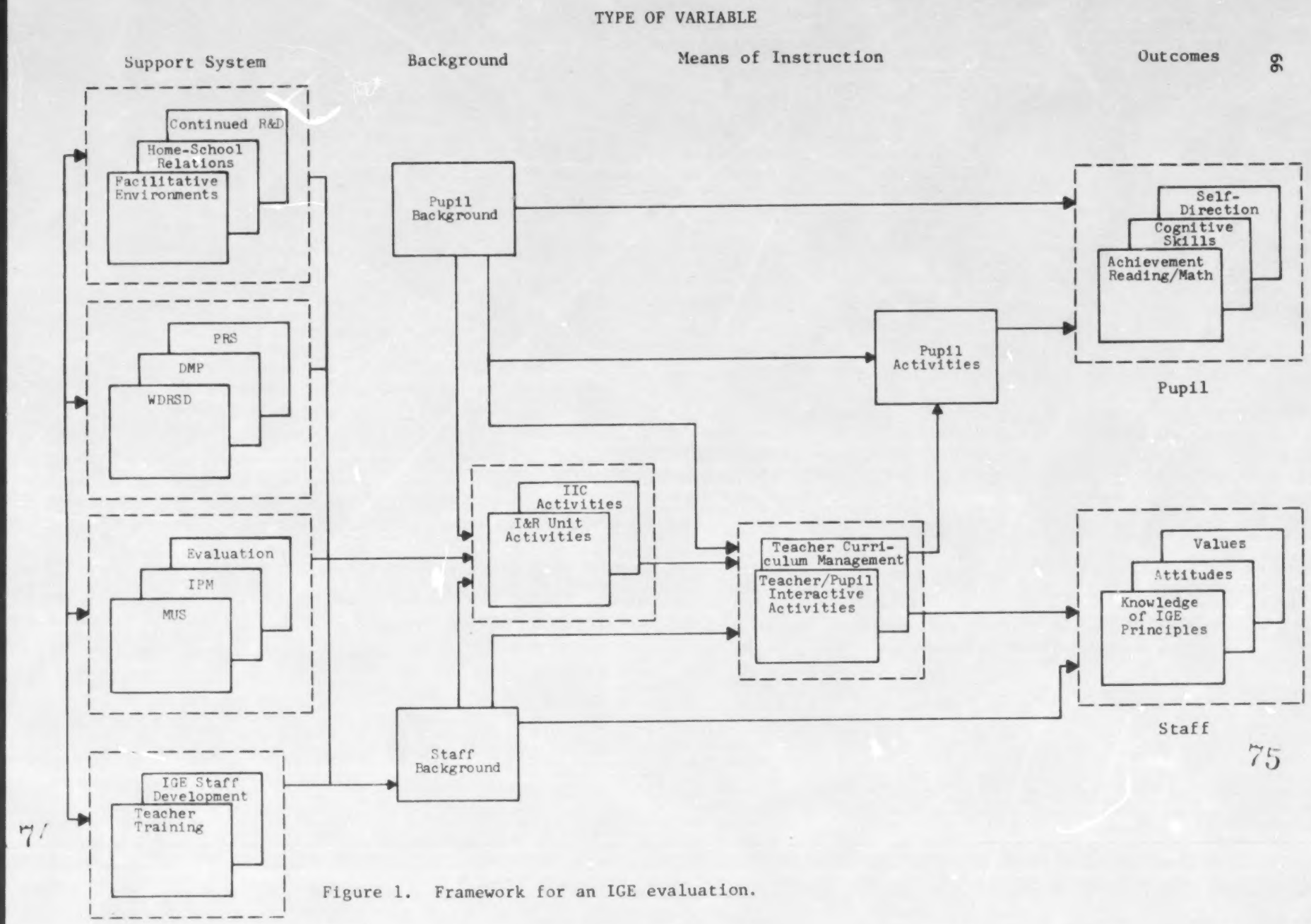


Figure 1. Framework for an IGE evaluation.

The functional relationships illustrated in Figure 1 are intended to convey the following: The degree of implementation of the IGE support systems along with pupil and staff backgrounds directly influence the means of instruction in an IGE school. The means of instruction, along with pupil and staff backgrounds, account for pupil and staff outcomes.

Structure of the IGE Evaluation Plan

The following guidelines have been adopted to insure that a reasonable portrayal of IGE schooling can be obtained.

1. The evaluation will begin by identifying and getting the cooperation of a large number of IGE schools. A population of approximately 950 IGE schools was identified in Spring 1976, about 770 of which have both second- and fifth-grade students. A stratified sample of approximately 300 schools has been drawn. Stratification was done on demographic and IGE-support characteristics to insure a wide variability of schools and situations.

2. The evaluation will limit its examination to teachers and students at the IGE equivalents of second and fifth grades. Second grade is the earliest at which group-administered paper-and-pencil tests can be given to children; fifth grade is the last common grade in elementary schools.

3. The evaluation plan will project the preparation of several follow-up studies designed to gather other data over a longer period of time on subsamples on the original population.

4. The evaluation plan and its execution will be monitored by the R & D Center IGE evaluation staff with the assistance of an IGE Evaluation Advisory Panel.

By following these guidelines the evaluation of IGE has been separated into four phases.

Phase I

The first phase will be a large sample investigation whose purposes are:

1. to determine the degree to which the seven components of IGE have been implemented.

2. to ascertain the relationship of degree of component implementation to means of instruction.

3. to ascertain the relationship of degree of component implementation to staff outcomes

4. to ascertain the relationship of degree of component implementation to pupil outcomes.

Information to answer these questions will be collected at two times. In April 1977 all 950 schools will be asked to confirm information on last year's questionnaire and to complete a Staff Development Needs Questionnaire. For 300 schools, more extensive self-report data will be collected in October 1977. It is this large sample study that will provide the basic information about IGE schooling.

Phase II

The second phase will be a small (30 school) sample follow-up investigation whose purposes are:

1. to determine the validity of the self-report data gathered in the large sample study
2. to use interview and observation data to extend the information about each category of variables
3. to gather cost data so that some indications of cost effectiveness can be determined.

This phase will also be subcontracted (during Spring 1977) and data are to be gathered during the school year 1977-78.

Phase III

The third phase will also be a small sample investigation using from six to ten Phase I schools. The purposes of this study are:

1. to determine the degree of reform evident in IGE schools
2. to determine the degree of renewal evident in IGE schools

This reform-renewal study will be a sociological investigation of exemplary IGE schools.

The question being asked is: Has the IGE view of schooling permeated the structure of the classroom? It would appear that there has been a tradition in which routines, subjects, facts, techniques, and desirable behavior patterns serve as scripts for teaching.

Phase IV

The fourth and final phase of this plan will be a series of small-scale studies focusing on the use and effectiveness of the curricular materials developed at the R & D Center--the Wisconsin Design for Reading Skills Development (WDRSD), Developing Mathematical Processes (DMP), and the Pre-Reading Skills Program (PRS). Each program was developed to be compatible with the IGE system and incorporates two of the components of IGE, the model of instructional programming and the model of evaluation for decision making.

All three programs underwent extensive evaluations and field tryouts during development. Information was gathered from content and measurement experts, from teachers, and from evaluators. The major elements of the programs were completed by Fall 1976 and are either in publication or in use.

Each program is being used by a number of schools throughout the country under a variety of conditions. For example, the programs are in use in both IGE and non-IGE schools. Exactly what the capability of each program is to be used effectively in a number of different situations is unknown.

Phase IV of the IGE evaluation has two major purposes:

1. to describe how WDRSD, DMP and PRS are being implemented and what their effects are in IGE and non-IGE settings

2. to compare the use of these programs and of other programs in IGE settings.

Phase IV will be divided into two data collection periods. The first descriptive period will be during the school year 1977-78 and will involve a sample of schools for each of the three programs. The second comparative period will be during the next school year, 1978-79, and will involve an expanded sample of schools for WDRSD and DMP to include schools not using either program.

Summary

As envisioned, this IGE evaluation plan should provide the R & D Center, current IGE schools, potential IGE schools, and the education profession with a comprehensive picture of IGE in action. The 300-school survey which examines the relationships among variables should provide baseline data about IGE schooling. The small sample studies then should add information and clarify relationships. We should be able to weave the findings from the four phases together so that a comprehensive picture of IGE emerges. This picture should illuminate the features that have made IGE a successful reform movement in American education.

APPENDIX B

SPRING 1977 CORRESPONDENCE
to IGE STATE NETWORK CONTACTS

the
Wisconsin
Research and Development Center
for Cognitive
Learning

(608) 263-4200

the University of Wisconsin · 1025 West Johnson Street · Madison, Wisconsin 53706 [redacted]

April 8, 1977

As you know, the National Institute of Education has funded the Center to conduct a three- to five-year evaluation of IGE. Four phases of the study have been defined:

I. A survey of three hundred schools selected, on the basis of responses to the Spring 1976 questionnaire, to represent the variety of degree of IGE implementation that is typical in schools.

II. A follow up on-site study of approximately thirty schools in the above sample.

III. Case studies of a small number (six to ten) exemplary IGE schools.

IV. Investigations of the effectiveness of Center curriculum products in IGE and non-IGE schools.

The enclosed letter describes Phase I of the evaluation in more detail. It is being sent to schools selected for that phase. Also enclosed is a list of schools in your state now being asked to cooperate in Phase I. It is possible that additional schools will be contacted if selected schools are unable to participate. We will keep you informed.

We would appreciate your assistance in encouraging schools to cooperate in this evaluation.

Cordially,

Thomas A. Romberg
Project Director, IGE Evaluation Project

74 the Wisconsin Research and Development Center for Cognitive Learning

(608) 263-4200

the University of Wisconsin · 1025 West Johnson Street · Madison, Wisconsin 53706 [redacted]

April 29, 1977

TO: IGE State Contact Persons

FROM: Tom Romberg TAR

RE: Phase I School Selection, R & D Center IGE Evaluation Project

Recently you received from me both a list of schools in your state who were asked to participate in Phase I of the R & D Center IGE Evaluation Project and a copy of the materials that were sent to the schools selected.

We had initially contacted 396 IGE schools across the states. To date, 48 have indicated that they are willing to participate in Phase I and 79 have indicated that they are not able to participate; in other words, only 32% of the schools initially contacted have responded in any way. Because of this response rate, we have decided that it is now necessary to contact the remaining 366 schools who responded to the 1976 IGE Schools Questionnaire but were not initially selected for Phase I participation. Therefore, we are now contacting those remaining schools in your state.

ww

cc: Walt Krupa

the
Wisconsin
Research and Development Center
for Cognitive
Learning

(608) 263-4200

the University of Wisconsin · 1025 West Johnson Street · Madison, Wisconsin 53706 · [redacted]

May 20, 1977

TO:

FROM: Tom Romberg TAR

RE: Phase I of the Wisconsin R & D Center's IGE Evaluation Project

Enclosed is a copy of the materials that are being sent to the schools in your state that have agreed to participate in Phase I. Your name has been listed as a carbon on the follow-up letter.

The status of replies from your state with respect to participation in Phase I is given below. The status numbers are current as of May 18. Percentages, given in parentheses, were calculated on the basis of the total number of schools in your state that received Phase I invitations.

	Reply Status				
State	Yes	No	Still Deciding	No Response Yet, Being Telephoned	Total
_____	(%)	(%)	(%)	(%)	(100%)

After all of the replies are in, we will provide you with a list of the schools that have agreed to participate. If you would like to know now which schools are in any of the above categories, please call Pam Klopp here at the Center at (608) 263-4098. Please call Pam collect if you can help with the response rate.

cc: Pam Klopp, R & D Center
Walt Krupa, R & D Center

APPENDIX C

MATERIALS SENT to PHASE I SCHOOLS to ARRANGE FOR PARTICIPATION

the
Wisconsin
Research and Development Center
for Cognitive
Learning

(608) 263-4200

the University of Wisconsin · 1025 West Johnson Street · Madison, Wisconsin 53706 · [redacted]

We are pleased that your school is able to cooperate in Phase I of the Center's IGE Evaluation. By doing some advance work now, we anticipate not having to contact you during the busy school opening period next fall and being prepared for smooth data gathering in October. The enclosures relate to the information that we need from you yet this spring.

Roster Forms for 1976-77 First Grade Students (yellow) and 1976-77 Fourth Grade Students (green). We know that the rosters you prepare for us now will not be up-to-date by fall--new students will enroll, and some proportion of students currently enrolled will not return. Since we will not want to test students who are not currently enrolled in your school, new students in the Fall will not be a concern to us. The problem of students currently enrolled who do not return in September will be addressed at the time of testing in October.

Up to 50 students will be tested at both grade levels. Each student will be randomly assigned to a test group; the tests administered to each group will differ. If your school has less than 50 students at both grade levels, the rosters are still needed in order to randomly assign the students to the different test groups. If your school has more than 50 students at both grade levels, 50 will be randomly selected and assigned to the groups. Directions for entering the rosters are printed at the top of the forms. We request that these particular forms be used to help insure ease of handling data.

School Staff Information sheet (blue). Some of the questionnaires to be completed in October will be for all school staff, while others will be only for the staff associated with the second- and fifth-grade students being tested. The numbers you provide will tell us the quantities we need to provide for your school.

We hope that these enclosures can be completed soon; a postage-paid envelope has been provided for their return. Please feel free to call me collect at (608) 263-4098 if you have questions.

Sincerely,

Pam Klopp
Evaluation Specialist

cc: Walt Krupa, R & D Center
Tom Romberg, R & D Center

PHASE I SCHOOL STAFF INFORMATION SHEET--WISCONSIN R & D CENTER IGE EVALUATION PROJECT

ID _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ School _____

Wisconsin R&D Center
for Cognitive Learning
The University of Wisconsin
1025 West Johnson Street
Madison, Wisconsin 53706

1. Please enter the number of persons in staff positions 1-10 listed below, both fulltime and parttime. For parttime, include only persons who are regularly assigned to your school at least one-third time.

SCHOOL BUILDING STAFF

No.	Staff Position
____	1. Unit (Learning Community) Teacher
____	2. Unit (Learning Community) Leader
____	3. Instructional Aide
____	4. Guidance Counselor
____	5. Specialist in music, art, physical education
____	6. IMC director/librarian
____	7. Principal
____	8. Assistant Principal
____	9. Curriculum Consultant
____	10. Other. (Include Special Education, Remedial Reading, Remedial Math, etc; exclude auxiliary staff such as school secretary, clerical aides, etc.) Specify the positions you've included in the Other category:

_____

_____

2. Please enter the number of staff persons for the Unit (Learning Community) from which 1977-78 second graders will be tested and for the Unit (Learning Community) from which 1977-78 fifth graders will be tested. Include both fulltime persons and parttime persons assigned at least one-third time to the Unit (Learning Community).

STAFF ASSIGNED TO THE UNIT (LEARNING COMMUNITY) FROM WHICH 1977-78 SECOND GRADERS WILL BE TESTED

No.	Staff Position
____*	1. Unit (Learning Community) Teacher
____*	2. Unit (Learning Community) Leader
____*	3. Instructional Aide
____*	4. Other. Specify the positions you've included: _____

STAFF ASSIGNED TO THE UNIT (LEARNING COMMUNITY) FROM WHICH 1977-78 FIFTH GRADERS WILL BE TESTED

No.	Staff Position
____*	1. Unit (Learning Community) Teacher
____*	2. Unit (Learning Community) Leader
____*	3. Instructional Aide
____*	4. Other. Specify the positions you've included: _____

* These numbers should be included in the numbers entered for School Building Staff, staff positions 1, 2, 3, and 10, on the left of this page.

PHASE I STUDENT ROSTER FORMS--WISCONSIN R & D CENTER IGE EVALUATION PROJECT

1. List names in most convenient order; alphabetizing not necessary. Print only names; no other information is needed.
2. Put one letter of student's name in each box. Print last name first, skip a box, print first name. See example.
3. Print middle names only for students with identical last and first names. Skip a box after first name, print middle name.
4. Leave the rest of the boxes in each row blank.

Wisconsin R&D Center
for Cognitive Learning
The University of Wisconsin
1025 West Johnson Street
Madison, Wisconsin 53706

ID _ _ _ _ _ _ _ _ _ _ _ _ School _____

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38
A	N	D	E	R	S	O	N		J	E	N	N	I	F	E	R		(EXAMPLE)																			

1976-77 FIRST GRADE STUDENTS

PHASE I STUDENT ROSTER FORMS--WISCONSIN R & D CENTER IGE EVALUATION PROJECT

1. List names in most convenient order; alphabetizing not necessary. Print only names; no other information is needed.
2. Put one letter of student's name in each box. Print last name first, skip a box, print first name. See example.
3. Print middle names only for students with identical last and first names. Skip a box after first name, print middle name.
4. Leave the rest of the boxes in each row blank.

Wisconsin R&D Center
for Cognitive Learning
The University of Wisconsin
1025 West Johnson Street
Madison, Wisconsin 53706

ID _ _ _ _ _ _ _ _ _ _ _ _ School _____

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38
B	A	K	E	R		R	Y	A	N		(EXAMPLE)																											

1976-77 FOURTH GRADE STUDENTS

APPENDIX D

STAFF EVALUATION MATERIALS

IGE Evaluation Phase I Instructional Improvement Committee Questionnaire

CONTENTS: 2 questionnaires
1 answer sheet (E)
1 pencil

WHO SHOULD COMPLETE THE QUESTIONNAIRES?

IIC Questionnaire

- *If an IIC exists,* members of the IIC should complete this questionnaire by consensus. Use answer sheet E.
- *If there is no IIC,* the building principal should answer questions **1, 2,** and **28-48** on answer sheet E. Also, please complete the discussion question in the boxed area, rows **61-80**.

Verification Copy, IGE Schools Questionnaire

The building principal (or designated person) should complete this form.

RETURNING MATERIALS:

Please return answer sheet E and the Verification Copy of the IGE Schools Questionnaire to the Wisconsin Research and Development Center in this envelope. Do not return the IIC Questionnaire.

the Wisconsin Research and Development Center for Cognitive Learning
1025 West Johnson Street · Madison, Wisconsin 53706

Source of Questionnaire

The questionnaire is adapted from Ironside, R. A. The 1971-72 nationwide installation of the multiunit/IGE model for elementary schools: A process evaluation. (OEC-0-71-3705) Princeton: Educational Testing Service, 1972. ED 066 623 The community types (page 3) were developed by the National Assessment of Educational Progress project.

Published by the Wisconsin Research and Development Center for Cognitive Learning, supported in part as a research and development center by funds from the National Institute of Education, Department of Health, Education, and Welfare. The opinions expressed herein do not necessarily reflect the position or policy of the National Institute of Education and no official endorsement by that agency should be inferred.

Center Contract No. NE-C-00-3-0065

Instructional (Program) Improvement Committee Structure and Function

Directions: Answers for this questionnaire should be recorded on answer sheet E, rows 1—40. The boxed area around rows 61—80 will be used for certain schools as directed below. No ID number is necessary.

The terms "Instructional Improvement Committee" (IIC) and "unit" are used throughout this questionnaire; as you read please substitute "Program Improvement Committee" (PIC) and "learning community" if these terms are used in your school.

SCHOOL SETTING

1 Please select the phrase below which best describes your community *or* the attendance area which your school serves. Select the *one* best phrase.

(0) *High metro.* Area in city with a population greater than 150,000 where a high proportion of the residents are in professional or managerial positions.

(1) *Low metro.* Area in city with a population greater than 150,000 where a high proportion of the residents are on welfare or are not regularly employed.

(2) *Urban fringe.* Community within the metropolitan area of a city with a population greater than 200,000, outside the city limits and thus not in the high or low metro groups.

(3) *Main big city.* Community within the city limits of a city with a population over 200,000 and not included in the high or low metro groups.

(4) *Medium city.* City with population between 25,000 and 200,000.

(5) *Small place.* Community with a population of less than 25,000.

(6) *Extreme rural.* Community with a population under 3,500 where most of the residents are farmers or farm workers.

STRUCTURE OF IIC

2 Does your school have an IIC?

(0) No
(1) Yes

If you answered (1) *Yes* for question 2, go on to the next question.

If you answered (0) *No,* please describe the leadership group/person or governing body (formal or informal) for your school in the boxed area around rows 61—80. Then, skipping questions 3—27, go to the section on CURRICULUM OBJECTIVES and complete the questionnaire.

Which staff members comprise the IIC on a *permanent and regular* basis? Mark (0) *No* or (1) *Yes* for questions 3–10.

3 Principal

4 Unit leaders

5 One or more regular staff teachers

6 One or more instructional services staff members (for example, media director, librarian)

7 One or more curriculum specialist/resource persons (for example, remedial reading teacher, art teacher)

8 One or more special education staff members (for example, learning disabilities teacher, speech therapist)

9 One or more pupil personnel services staff members (for example, guidance counselor, social worker)

10 One or more parent representatives

11 What is the total number of *permanent and regular* IIC members?

(0) 2-3
(1) 4-5
(2) 6-7
(3) 8-9
(4) 10-11
(5) 12 or more

12 Who usually serves as the IIC chairperson?

(0) Principal
(1) Unit leader
(2) Another IIC member
(3) Chairperson varies from meeting to meeting
(4) Do not have a chairperson

13 About how many hours per *month* are *scheduled* for regular IIC meetings?

(0) 1/2 hour
(1) 1 hour
(2) 2 hours
(3) 3
(4) 4
(5) 5
(6) 6
(7) 7
(8) 8
(9) 9 or more

14 Is an agenda prepared for each meeting?

(0) No
(1) Yes

15 If you answered (1) *Yes* for question **14**, is the agenda prepared in advance?

(0) No
(1) Yes

16 Is a formal log or set of minutes kept for each IIC meeting?

(0) No
(1) Yes

17 If you answered (1) *Yes* for question **16**, are copies of the minutes or log distributed after the meetings? If you answered (0) *No*, go to question **20**.

(0) No
(1) Yes

18 If you answered (1) *Yes* for question **17**, to whom are the minutes distributed?

(0) IIC members
(1) IIC plus selected staff members
(2) IIC plus all regular unit teachers
(3) IIC plus all other staff members

19 If you answered (1) *Yes* for question **17**, are the minutes regularly distributed to district staff outside the building?

(0) No
(1) Yes

20 Do you sometimes request non-IIC members to attend IIC meetings?

(0) No
(1) Yes

21 How often do you evaluate your IIC meetings or IIC activities and functions?

(0) Rarely
(1) Sometimes
(2) Frequently
(3) Continuously

FUNCTION OF IIC

Roughly what percentage of IIC time is devoted to the following broad activities? Use the code below to mark the answer sheet in rows 22–27. The percents for the various activities should add up to 100%.

(0) 0-9%	(5) 50-59%
(1) 10-19%	(6) 60-69%
(2) 20-29%	(7) 70-79%
(3) 30-39%	(8) 80-89%
(4) 40-49%	(9) 90-100%

Use the space below to work out the percents. Then transfer to the answer sheet, using the code.

22 Monitoring IGE implementation in the school and evaluating progress _____ % of time

23 Dealing with--explaining to, or getting support of--parents _____ % of time

24 Aiding the units in instructional programming in IGE subjects and related assistance such as securing materials and recording pupil progress _____ % of time

25 Planning and arranging in-service training for the whole staff _____ % of time

26 General management of the school and personnel relations _____ % of time

27 Planning (of all sorts) for operations during the next school year _____ % of time

Total 100 % of time

CURRICULUM OBJECTIVES

For which curriculum areas has your school adopted a set of school-wide specific instructional objectives? (Specific instructional objectives may be attained in a two to four week instructional period.) Please mark (0) *No* or (1) *Yes* for each curriculum area, questions **28**–**32**.

28 *Reading*

29 *Language arts*

30 *Mathematics*

31 *Science*

32 *Social studies*

How were the specific instructional objectives identified? For each curriculum area marked (1) *Yes* above, indicate how the various sources below were used.

Reading objectives

33 Taken from published curriculum(s)

(0) Directly
(1) With adaptation
(2) Not at all

34 Taken from objectives book(s) or catalog(s)

(0) Directly
(1) With adaptation
(2) Not at all

35 Developed locally by staff; not adaptations

(0) Entirely
(1) In part
(2) Not at all

Language arts objectives

36 Taken from published curriculum(s)

(0) Directly
(1) With adaptation
(2) Not at all

37 Taken from objectives book(s) or catalog(s)

(0) Directly
(1) With adaptation
(2) Not at all

38 Developed locally by staff; not adaptations

(0) Entirely
(1) In part
(2) Not at all

Mathematics objectives

39 Taken from published curriculum(s)

(0) Directly
(1) With adaptation
(2) Not at all

40 Taken from objectives book(s) or catalog(s)

(0) Directly
(1) With adaptation
(2) Not at all

41 Developed locally by staff; not adaptations

(0) Entirely
(1) In part
(2) Not at all

Science objectives

42 Taken from published curriculum(s)

(0) Directly
(1) With adaptation
(2) Not at all

43 Taken from objectives book(s) or catalog(s)

(0) Directly
(1) With adaptation
(2) Not at all

44 Developed locally by staff; not adaptations

(0) Entirely
(1) In part
(2) Not at all

Social studies objectives

45 Taken from published curriculum(s)

(0) Directly
(1) With adaptation
(2) Not at all

46 Taken from objectives book(s) or catalog(s)

(0) Directly
(1) With adaptation
(2) Not at all

47 Developed locally by staff; not adaptations

(0) Entirely
(1) In part
(2) Not at all

48 How many people worked on this questionnaire?

(0) 1
(1) 2-3
(2) 4-5
(3) 6-7
(4) 8-9
(5) 10-11
(6) 12 or more

IGE Schools Questionnaire

Wisconsin R & D Center
1025 W. Johnson Street
Madison, Wisconsin 53706

VERIFICATION COPY

School Number ___ ___ ___

School Name _____

You provided the information that is written on this questionnaire copy. Please check it carefully and change any information that is no longer accurate. Also, if there are any incomplete sections, please provide the missing information.

I. Background

A. Do you consider your school an IGE school?

__1. Yes
__2. We're working on it
__3. Never have been
__4. Not any more → Please give your reasons for dropping the IGE program in the space below. Please answer B and C and then return this questionnaire in the accompanying envelope.

B. When did your school organize its first I & R Unit or learning community?

__1. fall
66 67 68 69 70 71 72 73 74 75 76 77
__2. spring

C. With which agency did your school's involvement in IGE originate?

__1. Wisconsin R & D Center for Cognitive Learning
__2. Institute for Development of Educational Activities, /I/D/E/A/
__3. Both
__4. Other (Please name)_____

D. How many students are currently enrolled in your school?

___ ___ ___ ___

E. What is the grade range in your school?

Preschool K 1 2 3 4 5 6 7 8 9 10 11 12

II. **School Organization** The chart below is for regular*, academic** units*** and teachers only. 2

*"regular" means not composed exclusively of special education pupils.
**"academic" means not composed exclusively of special area teachers (art, music, etc.)
***The term "unit" describes a "learning community" as well. Similarly, "unit leader" refers to "learning community leader" as well.

A. How many regular, academic units are in your school?_____

On the chart below, describe each regular, academic unit according to the questions at the left. Exclude special area teachers, student teachers/interns, and aides: (If there are more than 7 regular, academic units please attach a page listing this information for those units.

Units:	Unit 1	Unit 2	Unit 3	Unit 4	Unit 5	Unit 6	Unit 7
B. Grade range (for example K-1, 2-3)							
C. Number of fulltime teachers assigned only to this unit (including unit leader)							
D. Number of pupils (approximate)							
E. Does this unit include any special education pupils?	__1.Yes __2.No	__1.Yes __2.No	__1.Yes __2.No	__1.Yes __2.No	__1.Yes __2.No	__1.Yes __2.No	__1.Yes __2.No
F. Does this unit staff have regular planning meetings at least once a week?	__1.Yes __2.No	__1.Yes __2.No	__1.Yes __2.No	__1.Yes __2.No	__1.Yes __2.No	__1.Yes __2.No	__1.Yes __2.No
G. IGE subject(s) (An IGE subject is one in which teachers follow the whole sequence of: identifying objectives for the students in their unit, preassessing for those objectives, then grouping students according to which objectives they need to master, instructing on those objectives, then testing again, and regrouping.)	___Reading ___LangArts ___Math ___Science ___SocSt ___Music, art, phy ed ___Other (please specify)	___Reading ___LangArts ___Math ___Science ___SocSt ___Music, art, phy ed ___Other (please specify)	___Reading ___LangArts ___Math ___Science ___SocSt ___Music, art, phy ed ___Other (please specify)	___Reading ___LangArts ___Math ___Science ___SocSt ___Music, art, phy ed ___Other (please specify)	___Reading ___LangArts ___Math ___Science ___SocSt ___Music, art, phy ed ___Other (please specify)	___Reading ___LangArts ___Math ___Science ___SocSt ___Music, art, phy ed ___Other (please specify)	___Reading ___LangArts ___Math ___Science ___SocSt ___Music, art, phy ed ___Other (please specify)

H. Does the description on the chart include all the pupils in the school?
___ 16. Yes ___ No, not included are (check all that apply; enter numbers)
___ 1. kindergarten pupils, ___ out of ___ total kindergartners
___ 2. special education pupils, ___ out of ___ total special education pupils
___ 3. other "regular" pupils in self-contained classrooms
___ 4. other (please describe)_____

97

B. Do you have special education pupils in your school?

__3. No (Go to C below) __X. Yes

Do any of these pupils receive instruction on a regular basis in a regular academic unit?

__2. No __1. Yes

C. Has your school made any provision for release time during the school day for unit staff members to plan together?

__2. No (Go to D below) __1. Yes

How many hours per week of release time does each unit typically have (to nearest quarter hour)?

__ __ . __ __

D. Do all of your regular academic units have unit leaders?

__2. No (Go to E below) __1. Yes

Is it your school's policy to rotate the unit leader role among unit teachers?

__2. No (Go to E below) __1. Yes

How often are the leaders rotated?
__1. less than once a year; __2. once a year;
__3. twice a year; __4. more than twice a year

E. Do the principal and unit leaders meet as a group at regular intervals (in addition to school-wide faculty meetings)?

__2. No (Go to F) __1. Yes

How frequently does this group meet?
__1. twice a year __3. twice a month
__2. once a month __4. once a week
__9. other (please specify)_____

F. Do you have an Instructional Materials Center (IMC)? 3 98

__2. No (Go to G below) __1. Yes

Do you have regular IMC staff?

__2. No __11. Yes, fulltime
__12. Yes, parttime

G1. Does your school have any paid instructional or clerical aides?
__2. No __1. Yes

G2. Does your school have any volunteer instructional or clerical aides?
__2. No __1. Yes

H1. Does your school have any student teachers/interns this semester (Spring 1977)?
__ No __ Yes

H2. Did your school have any student teachers/interns last semester (Fall 1976)?
__ No __ Yes

III. Affiliation with Other IGE Schools

A. Is there more than one IGE school in your district, in the area under the jurisdiction of your school board?

__2. No (Go to B) __1. Yes

Do you have meetings about IGE with representatives from only these IGE schools and district office personnel? (This group might be called the System-wide Program Committee /SPC/)?

__2. No (Go to B) __1. Yes

How often does this group meet?

__1. less than once a year __4. three times a year
__2. once a year __5. four times a year
__3. twice a year __6. more than four times a year

B. Does your school belong to any other group of IGE schools (League, Network regional group, PACT, HUB) which includes IGE schools that at not in your school district or school system?

__2. No (Go to Section IV below)
__1. Yes

What is the name of this group?

_____

IV. Assessment and Evaluation

A. Does your school participate in a standardized achievement testing program?

__2. No
__1. Yes

B. Did your school or school district do an evaluation of the IGE program during the 1976-77 school year?

__2. No (Go to Section V)
__1. Yes

How can we get a copy of the evaluation report?

_____

_____

_____

V. Curriculum Products

4

Check any of the following R & D Center curriculum products being used in your school and indicate the units or grades of use:

Units/ grades	√ if used	
____	____	Developing Mathematical Processes(DMP)
____	____	PreReading Skills (PRS)
		Individually Guided Motivation (IGM) procedures
____	____	Adult-child conferences to encourage independent reading
____	____	Teacher-child conferences for goal setting
____	____	Guiding older children in tutoring younger children
____	____	Guiding children toward self-directed prosocial behavior
		Wisconsin Design for Reading Skill Development(WDRSD, Design) areas
____	____	Word Attack
____	____	Study Skills
____	____	Comprehension
____	____	Self-Directed, Interpretive, and Creative Reading

100

IGE Evaluation Phase I
General Staff Questionnaires

CONTENTS: 1 questionnaire booklet
2 answer sheets (A,B)
1 pencil

WHO SHOULD COMPLETE THE QUESTIONNAIRES?

Answer the questions below to determine whether or not you need to respond to the questionnaires.

- are you presently assigned to this school 1/3 time or more?
- were you assigned to this school at least 1/3 time last year?

If your answer to both questions is *yes*, please complete the questionnaires. If your answer to either or both of these questions is *no*, do not complete the questionnaires. Please return the packet intact to your principal.

It is not necessary for aides to complete these materials.

RETURNING MATERIALS:

Completed answer sheets should be replaced in this envelope and returned to your principal for mailing to the Wisconsin Research and Development Center. The envelope may be sealed to insure anorymity. Please do not return the questionnaire booklet.

Envelope for Staff Materials (sample)

the Wisconsin Research and Development Center for Cognitive Learning
1025 West Johnson Street · Madison, Wisconsin 53706

Source of Questionnaires

Assumptions about Conditions of Effective Schooling
Based on Lipham, J. M. and Fruth, M. J. The Principal and Individually Guided Education. Reading, Massachusetts: Addison-Wesley, 1976.

Assumptions about Learning and Knowledge
Adapted from Barth, R. S. So you want to change to an open classroom. Phi Delta Kappan (October) 1971, 97-99.

IGE Implementation Survey (formerly called *Staff Development Needs)*
Adapted from Klausmeier, H. J. and others. Individually Guided Education in elementary and middle schools: A handbook for implementors and college instructors. Preliminary edition. Madison: IGE Teacher Education Project, University of Wisconsin-Madison, 1976.

The questionnaire was developed by Herbert J. Klausmeier and Walter E. Krupa. It draws heavily on a less extensive implementation questionnaire developed and used by William Ashmore, Wisconsin Department of Public Instruction, Madison, Wisconsin.

Job Satisfaction Survey
Staff Background Information
Adapted from Mendenhall, D. R. Relationship of organizational structure and leadership behavior to teacher satisfaction in IGE schools. Unpublished doctoral dissertation, University of Wisconsin-Madison, 1977.

Published by the Wisconsin Research and Development Center for Cognitive Learning, supported in part as a research and development center by funds from the National Institute of Education, Department of Health, Education, and Welfare. The opinions expressed herein do not necessarily reflect the position or policy of the National Institute of Education and no official endorsement by that agency should be inferred

Center Contract No. NE-C-00-3-0065

Directions

INTRODUCTION

The Wisconsin Research and Development Center is grateful for your contribution to the nationwide evaluation of IGE. Please follow these directions carefully to assure the utility and accuracy of the information.

WHO SHOULD COMPLETE THE QUESTIONNAIRES?

The questionnaires should be completed by *all* continuing professional staff assigned at least one-third time to this building during both the 1976-77 and 1977-78 school years.

Professional staff includes curriculum consultants, specialists/resource persons, special education staff, instructional materials staff, pupil personnel staff, principals, and teaching staff.

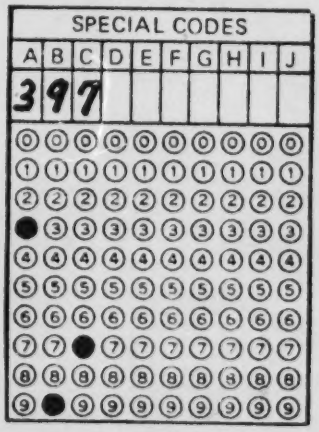
New staff and continuing personnel assigned less than one-third time to this building should not complete these materials. Although it is recognized that aides are a vital part of any IGE school's program, their responsibilities and involvement in instruction vary widely from school to school; therefore, it is not necessary for aides to complete the questionnaires.

ID NUMBER

Each staff member has a unique ID number which appears on the upper right hand corner on the outside of this packet. The ID number provides anonymity, yet allows the Center to identify responses from several answer sheets as belonging to a single person. (Staff members of units from which Grade 2 and/or 5 students to be tested were selected must use the same ID number on materials in their *unit* packets.)

Record your ID number in columns A, B, and C of the Special Code area on *both* answer sheets before you begin working on the questionnaires. Place the numbers in the space provided; then darken the corresponding circles in the grid as shown in this example.

Example



MARKING ANSWER SHEETS

The #2 pencils provided in the packet must be used for all parts of the answer sheet, including ID information. Answer spaces should be filled in darkly and completely.

QUESTIONNAIRE CONTENT AND WORKING TIME

There are a total of five different questionnaires in this booklet. Completion of all five requires slightly over 1 and 1/2 hours working time.

The first two questionnaires, to be answered on response sheet A, are concerned with background information about your individual professional experience and about your school's implementation of IGE. The latter three questionnaires deal with your attitudes toward your profession, job, and position; toward assumptions about schooling; and toward certain general assumptions about learning and knowledge. Answer sheet B will be used for these three questionnaires.

Questionnaire	Estimated Working Time	Answer Sheet
Staff Background Information	20 minutes	A, rows 1-23
IGE Implementation Survey	30 minutes	A, rows 24-100
Job Satisfaction Survey	20 minutes	B, rows 1-50
Assumptions about Conditions of Effective Schooling	15 minutes	B, rows 51-78
Assumptions about Learning and Knowledge	15 minutes	B, rows 81-108
	Total 100 minutes	

RETURNING MATERIALS

When you have completed the questionnaires, replace answer sheets A and B in the envelope and return it to your principal (or other person responsible for the IGE evaluation). It is not necessary to return the questionnaire booklet.

Staff Background Information

Directions: Please respond on answer sheet A, rows 1–23.

POSITION IN SCHOOL

1 Identify your current personnel position. Select *one*.

(0) Curriculum consultant or specialist/resource person
Examples: remedial teachers
reading/math specialists
music, art and physical education teachers
bilingual specialists

(1) Special education staff
Examples: therapists in speech, language or hearing
teachers of orthopedically or multiply handicapped
teachers of EMH or EMR or ED children or of children with learning or behavioral disabilities

(2) Instructional materials staff
Examples: IMC directors
librarians
AV/media directors

(3) Pupil personnel services staff
Examples: psychologists
social workers
guidance counselors
nurses

(4) Unit/learning community leader (even though you are also a unit teacher, mark this choice)

(5) Teacher
Examples: regular staff teachers in units/learning communities
teachers in self-contained classrooms

(6) Principal
Examples: administrative principals
teaching principals
assistant principals

2 About what amount of time are you assigned to this building?

(0) One-fourth
(1) One-third
(2) One-half
(3) Two-thirds
(4) Three-fourths
(5) Full time

3 What is your assignment within the school?

(0) assigned to the school as a whole
(1) assigned to a self-contained classroom
(2) assigned to one unit/learning community
(3) assigned to two units/learning communities
(4) assigned to three or more units/learning communities

4 What is the *lowest* grade level represented in your assignment?

(0) Kindergarten
(1) Grade 1
(2) Grade 2
(3) Grade 3
(4) Grade 4
(5) Grade 5
(6) Grade 6
(7) Grade 7
(8) Grade 8
(9) Preschool

5 What is the *highest* grade level represented in your assignment?

(0) Kindergarten
(1) Grade 1
(2) Grade 2
(3) Grade 3
(4) Grade 4
(5) Grade 5
(6) Grade 6
(7) Grade 7
(8) Grade 8
(9) Preschool

3

6 Do you attend all or most regularly scheduled meetings of one or more units/learning communities?

(0) No
(1) Yes

7 Do you regularly attend Instructional (Program) Improvement Committee meetings?

(0) No
(1) Yes

PERSONAL BACKGROUND

8 What is your age?

(0) 21-25
(1) 26-30
(2) 31-35
(3) 36-40
(4) 41-45
(5) 46-50
(6) 51-55
(7) 56-60
(8) over 60

9 What is your sex?

(0) Female
(1) Male

10 What is the highest level of professional preparation you have completed?

(0) Bachelors degree
(1) Bachelors degree + 16 credits
(2) Masters degree
(3) Masters degree + 16 credits
(4) Masters degree + 32 credits
(5) Doctoral degree

11 Are you presently enrolled in a degree program?

(0) No
(1) Yes

12 To how many professional organizations do you belong?

(0) 0
(1) 1
(2) 2
(3) 3
(4) 4
(5) 5
(6) 6
(7) 7
(8) 8
(9) 9 or more

13 How many professional organization meetings do you attend each school year?

(0) 0-2
(1) 3-6
(2) 7-10
(3) 11-15
(4) 16-20
(5) 21-25
(6) 26-30
(7) 31-35
(8) 36-40
(9) over 40

14 How many offices do you hold or have you held in the past 5 years in professional organizations?

(0) 0
(1) 1
(2) 2
(3) 3
(4) 4
(5) 5
(6) 6
(7) 7
(8) 8
(9) 9 or more

15 How many presentations and articles have you prepared for professional organizations in the past 5 years?

(0) 0-2
(1) 3-6
(2) 7-10
(3) 11-15
(4) 16-20
(5) 21-25
(6) 26-30
(7) 31-35
(8) 36-40
(9) over 40

16 Of how many district committees are you currently a member (i.e., curriculum, Systemwide Program Committee, inservice, etc.)?

(0) 0
(1) 1
(2) 2
(3) 3
(4) 4
(5) 5
(6) 6
(7) 7
(8) 8
(9) 9 or more

17 Have you attended a workshop or other training to implement IGE in your school or district?

(0) No
(1) Yes

18 Have you attended a workshop or other training to implement IGE with people from other districts in your state or other states?

(0) No
(1) Yes

19 Have you provided instruction at a workshop or other training to implement IGE?

(0) No
(1) Yes

In responding to the next four questions, describe your *professional* experience in the *field of education*. Do not include years of internship/student teaching or of employment in another setting (e.g., years that a librarian worked in a *city* library would not be included).

Note: if you have both taught and been an administrator, or, if you were first a classroom teacher and then became a speech therapost, etc., indicate the *total* of the years in both types of position.

20 How many years have you taught and/or worked in an administrative/other (e.g. pupil personnel services) capacity?

(0) 0-2
(1) 3-6
(2) 7-10
(3) 11-15
(4) 16-20
(5) 21-25
(6) 26-30
(7) 31-35
(8) 36-40
(9) Over 40

21 How many of these years of experience have been in this district?

(0) 0-2
(1) 3-6
(2) 7-10
(3) 11-15
(4) 16-20
(5) 21-25
(6) 26-30
(7) over 30

22 How many of these years of experience have been in an IGE school?

(0) 0
(1) 1
(2) 2
(3) 3
(4) 4
(5) 5
(6) 6
(7) 7
(8) 8
(9) 9 or more

23 How many of these years of experience have been in this school?

(0) 0-2
(1) 3-6
(2) 7-10
(3) 11-15
(4) 16-20
(5) 21-25
(6) over 25

IGE Implementation Survey

Directions: This questionnaire is about the IGE program in your school. It contains 77 statements (concepts) dealing with outcomes, organizational matters, and processes. Please indicate *your* judgment for each statement for your school on answer sheet A in rows 24-100 using the following response code.

(0) = NO IMPLEMENTATION. The concept is not operative in this school.

(1) = SOME IMPLEMENTATION. The concept is only partially developed or only partially applied; e.g., only part of the students are in I & R Units.

(2) = ADEQUATE IMPLEMENTATION. The concept is reasonably well developed and applied; e.g., all the students are in I & R Units but conflicts sometimes arise among the staff.

(3) = APPROACHING IDEAL IMPLEMENTATION. The concept is highly developed and applied creatively; e.g., all students are in I & R Units and interpersonal relations are good among the students and the staff.

(4) = IDEAL IMPLEMENTATION. The concept is highly developed and the staff is capable of maintaining the high level without external assistance.

We do not expect you to spend much more than 30 minutes completing this questionnaire. We expect "first reaction" responses.

The list below may be of use in relating terms used in the questionnaire to terms used in your school.

I & R Unit---Learning Community, team

Unit leader---Learning Community leader, team leader

Instructional Improvement Committee (IIC)---Program Improvement Committee (PIC)

Instructional Programming Model---Learning cycle plus steps for school-wide and system-wide statements of instructional objectives

Component 1--THE MULTIUNIT

ORGANIZATIONAL-ADMINISTRATIVE ARRANGEMENTS

The multiunit organizational and administrative arrangements comprised of the Instruction and Research (I & R) Units, the Instructional Improvement Committee (IIC), and the Systemwide Program Committee (SPC) function effectively, creating a facilitative environment for the students' educational and personal growth and for the personal and professional development of the staff.

24 Each I & R unit functions effectively.

25 Each I & R unit is composed of 75-150 students representing an age range of about four years; 3-5 staff teachers, each of whom is strong in a different curricular area; and a teacher who serves as the unit leader.

26 Special teachers, aides, and prospective teachers who work in the school are affiliated with one or more of the I & R units.

27 The entire instructional staff and the students are organized into I & R units.

28 I & R unit meetings are chaired by the unit leader.

29 Each I & R unit staff plans and coordinates the activities of the I & R unit, taking into account the IIC's decisions and the needs and objectives of the staff and students of the unit.

30 Each teacher of the I & R unit participates in the unit meetings and the related planning and decision making.

31 Each teacher serves as a teacher-advisor for part of the students.

32 The IIC functions effectively to coordinate the educational program of the school and its program of staff development, home-school-community relations, research and development, and external relations, taking into account district and state requirements and the needs and objectives of each I & R unit.

33 The IIC is composed of the principal and unit leaders. Special teachers, the director of the instructional materials center, and parents and community representatives are also members of the IIC and participate in its meetings when matters of concern to them are on the agenda.

34 IIC meetings are chaired by the principal.

35 Each unit leader participates in the decision making in the IIC meetings, transmits information from the unit staff to the IIC, and transmits to the unit staff and attempts to have implemented decisions made by the IIC.

36 The SPC functions effectively to coordinate the IGE program of the district, taking into account district policies and state requirements.

37 The SPC is composed of the district superintendent, principals of IGE schools and representative principals of other schools, representative unit leaders and teachers of IGE and other schools, and a representative(s) of community group(s).

38 Subject-matter coordinators, various specialists within the district, and external consultants participate in SPC meetings when program matters related to their areas of speciality are on the agenda.

39 SPC meetings are chaired by the superintendent or his designee.

40 The principal of each IGE school participates in decision making in meetings of the SPC, transmits information from IGE school staff to the SPC, and attemps to have implemented decisions made by the SPC.

41 When a large percentage of the schools of a district are IGE, the SPC is integrated into the district administrative structure and all district officials have supporting roles for IGE schooling.

Component 2--INSTRUCTIONAL PROGRAMMING FOR THE INDIVIDUAL STUDENT

Instruction in the various curricular areas that both meets the needs of individual students and contributes to attaining the school's educational objectives is carried out in accordance with the seven steps of the model of instructional programming for the individual student; each I & R Unit obtains appropriately high student achievement and healthy personal development.

The school's IIC, taking into account district policies and programs and interacting with the I & R unit staffs:

42 Formulates the educational objectives in the various curricular areas and the affective domain to be attained by the school's student population during the forthcoming year.

43 Coordinates the identification of specific instructional objectives related to each of the general educational objectives or provides for their formulation.

44 Indicates the instructional objectives which should be attained to a criterion of mastery by all students at some time during their elementary school years, those which should be achieved by all students to a level appropriate for each student, and those which should be attained only by some students, either to a mastery criterion or to a level judged appropriate for the particular student, are also specified.

45 Coordinates the identification of instructional materials and equipment that will be needed to attain the objectives, or provides for their availability.

46 Outlines the means for evaluating students' achievement of the instructional objectives and identifies related measurement tools or makes provisons to construct them.

47 Identifies the record-keeping procedures and record-keeping forms or makes provisions for their development.

48 *The staff of each I & R Unit* estimates the instructional objectives that may be attainable by the students of their unit.

49 The staff of each I & R Unit using available records, teacher observation, work samples, performance tests, and paper-pencil tests as appropriate, determines the level of achievement of their students related to the instructional objectives identified in the various curricular areas and also identifies the learning style, level of motivation, and other characteristics of the students.

50 Based upon the preassessment, the staff of each I & R Unit sets the instructional objectives for each student of the unit to attain over a short period of time; when the students select or formulate their own objectives, the staff makes provisions for individual teachers to carry out this process with the students.

51 The staff of each I & R Unit in unit meetings outlines the general pattern of instructional programming for their students; each staff teacher implements the unit's strategy with the particular students selected or assigned in the unit meeting.

52 Differences among students in rates of learning, learning styles, and other characteristics are provided for by varying (a) the amount of attention and guidance by the teacher, (b) the amount of time spent in interaction among students, (c) the use of printed materials, audiovisual materials, and direct experiencing of phenomena, (d) the use of space and equipment (media), and (e) the amount of time spent by each student in one-to-one interactions with the teacher or media, independent study, adult- or student-led small group activities, and adult-led group activities.

53 The students, with increasing age and experience, assume more direction of their own learning activities, their social conduct, and the management of their instructional programs.

54 The staff of each I & R Unit, with appropriate involvement of the students, evaluates the students' attainment of their instructional objectives, taking into account whether the criterion for the particular objectives is mastery or whether it is performance at a level judged appropriate for the individual student.

55 The staff of each I & R Unit decides the next activities for each student based on summative evaluation gathered at the end of each instructional sequence.

Component 3--CURRICULAR PROGRAMS AND MATERIALS

Student attainment of instructional objectives is promoted through the development of materials and/or the selection of published curricular programs that are cost effective in terms of student learning and teacher time and effort.

56 The published curricular guides for teachers include statements of the instructional objectives, evaluation tools and procedures related to the objectives, suggested instructional activities, and record-keeping devices and procedures.

57 The materials for students include films, film-strips, printed materials, manipulatives, and other forms as needed to adapt instruction to the learning styles, levels of reading achievement, and other characteristics of the students.

58 A list or inventory of all available materials in the school building is developed for use by the teachers.

59 The instructional staff or a representative committee of staff cross reference these materials to the broad schoolwide educational objectives.

60 The instructional staff select those materials which are appropriate for each student to attain the specific instructional objectives.

61 The instructional materials are in the school building, easily accesible by the teacher and student.

62 An instructional materials center (IMC) is established at the school.

63 The instructional materials center (IMC) is staffed by certified personnel.

Component 4--EVALUATION FOR DECISION MAKING

Student learning, students' instructional programs, the school's curricular programs, and IGE as a system are monitored and improved through systematic evaluation carried out by the I & R Unit staffs, with appropriate delegation to individual unit leaders and the principal.

64 Each student is evaluated by the I & R Unit staff during and at the end of instructional sequences.

65 Feedback is provided to individual students to facilitate their learning.

66 Feedback is provided to teachers to improve their instruction.

67 The I & R Unit staff evaluates the effectiveness of each student's complete instructional program during the year in all curricular areas.

68 The I & R Unit staff uses the information in (44) to improve subsequent instructional programming for the student.

69 The I & R Unit staff evaluates the effectiveness of its instruction in the curricular areas and affective domain, using summative evaluation information gathered systematically across series of instructional sequences.

70 The I & R Unit staff uses the information in (46) above in decision making regarding objectives, materials, and activities pertaining to each curricular area.

71 The IIC evaluates attainment of the school's educational objectives by the student population of the school based on summative evaluation information gathered systematically across the I & R Units.

72 The IIC uses the information in (48) above in decision making regarding the schools's educational objectives and students' achievements related thereto.

Component 5--HOME-SCHOOL-COMMUNITY RELATIONS

Cooperative educational efforts among teachers, parents, and children; effective communications between the school and the home and community, and the early identification and resolution of potential conflict situations are achieved through an effective program of home-school-community relations.

73 Representative parents and other citizens, as members of the SPC, IIC, and I & R Units, participate in planning, implementing, and evaluating the program.

74 The program is developed and coordinated at appropriate levels by the I & R Unit staff, the IIC, and the SPC.

75 The school's procedures for interpreting and reporting progress and problems with instruction to the community are effective.

76 The school's procedures for interpreting and reporting each student's progress and problems to the parents are effective.

77 Human resources, particularly volunteers, are recruited for participation in the school's activities.

78 Material resources of the community are used within and outside the school building in the instruction of students.

79 Visitations in the home and in the school are used to increase effective communication and conflict resolution.

80 The program is evaluated regularly.

81 The school periodically performs an analysis of community attitudes regarding present and future school programs and practices.

Component 6--FACILITATIVE ENVIRONMENTS

The environment for learning and instruction within each IGE school is enriched through the intellectual, technical, and material support provided by the intraorganizational arrangements and structure (I & R Units, IIC, and SPC) and extraorganizational arrangements and structure (Leagues, Regional IGE Coordinating Councils, State IGE Coordinating Council, teacher education institutions, other external agencies.)

82 Each I & R Unit meets at least three hours weekly during school hours to plan and coordinate their activities.

83 The IIC meets weekly during school hours to plan and coordinate their activities.

84 The I & R Units, the IIC, and the SPC cooperate in assuring that essential material resources of all kinds are available in quantities needed for excellent instruction.

85 Noncredit workshops and other staff development activities involving only school and district personnel are arranged for preceding the opening of school and during the school year.

86 The entire staff of your school, or selected members as appropriate, participate in non-credit staff development activities and in credit courses conducted by external agencies and institutions.

87 The SPC and IIC cooperate to provide the time during the school day and during the school year for staff development in the amount needed for effective education.

88 A state IGE network, composed of local IGE schools, teacher education institutions, the state education agency, and intermediate education agencies, functions effectively at the state, regional, and local level to coordinate IGE implementation in your state.

89 The State IGE Coordinating Council, composed of representatives of the state education agency and of representatives of teacher education institutions, intermediate agencies, and local school districts from the various Regional IGE

Coordinating Councils of the state, coordinates IGE activities at the state level.

90 A Regional IGE Coordinating Council, comprised of representatives of the SPC's of the area, teacher education institutions, intermediate agencies, and state education agency coordinate IGE activities in your geographic area.

91 Credit courses and/or noncredit staff development programs are provided throughout your state to assist schools in awareness, commitment, and changeover to IGE.

92 Credit courses and/or noncredit staff development programs are provided throughout your state to assist IGE schools refine their IGE practices.

93 Preservice teacher education courses and programs are offered in your geographic area to prepare teachers for IGE.

94 Graduate courses and programs are offered in your geographic area to prepare prospective unit leaders and staff teachers for IGE.

95 Graduate courses and programs are offered in your geographic area to prepare prospective principals and other administrators and specialists for IGE.

96 Graduate courses and/or staff development programs are offered in your school district to enable teachers, unit leaders, principals, and others experienced in IGE to improve their competencies.

Component 7--RESEARCH AND DEVELOPMENT

Student learning and personality development, curricula, instructional and administrative processes, and the roles of school personnel become better understood and also are improved through continuous research and development conducted by IGE school personnel and cooperating individuals and agencies.

97 Practical problems in implementing IGE are identified and solutions to them are sought in your school.

98 Newly developed/prepared curricular materials for possible district-wide adoption are field tested and evaluated in your school.

99 Innovative teaching techniques are developed and evaluated in your school.

100 External agencies are identified to participate in research and development in your school.

Note: You will use answer sheet B for the next questionnaire. Please be sure to put your staff ID number in columns A, B, and C of the Special Code area on answer sheet B.

Job Satisfaction Survey

Directions: Please indicate your feelings of satisfaction with your job situation. For each item answer by indicating the phrase which most accurately describes your feelings. Use the code below and rows 1-50 of answer sheet B. Note: principals should omit the first ten questions.

(0) = Not satisfied
(1) = Somewhat satisfied
(2) = Satisfied
(3) = Quite satisfied
(4) = Very satisfied

How satisfied are you with:

1 the professional competence and leadership of your building administrators?

2 the ability of your building administrators to encourage people to work together?

3 the manner in which school policies and regulations are enforced?

4 the recognition you receive from your building administrators for your teaching achievements?

5 the procedures used to evaluate teachers in your school?

6 the fairness of the building administration in the assigning of extra duties?

7 the opportunities provided to discuss problems with building administrative personnel?

8 the trust you have in your building administrators?

9 the administrators' trust in you?

10 the innovativeness of your building administrators?

11 the personal and social relationships you have with other teachers?

12 the recognition you get from other teachers for your work?

13 the quality of work of other teachers in your school?

14 the amount of work done by other teachers in your school?

15 teaching, in light of what you expected to be doing as a teacher?

16 your future in your school district?

17 your opportunities for growth in your profession?

18 your school as an organization to work for?

19 the professionalism your school district shows toward teachers?

20 the degree of your involvement in your school?

21 the general reputation of your school?

22 the opportunities that you have to influence school policy?

23 your awareness of what is "going on" in your school?

24 the goals emphasized by your school?

25 the amount of money you make?

26 the salary schedule and fringe benefits in your school district?

27 the physical facilities of your school?

28 the number of students accommodated in your school?

29 the availability of appropriate instructional materials and equipment?

30 the arrangement of space and equipment in your school?

31 the amount of preparation time provided for teachers in your school?

32 the custodial services provided in your school?

33 the quality of the work you do?

34 the extent to which you are motivated by your job?

35 the freedom that you have to experiment with instructional methods?

36 the intellectual stimulation that you receive from your work?

37 the opportunities that you have to teach in your major areas of interest?

38 the amount of work you are expected to do?

39 the amount of time that you actually spend in teaching?

40 the total time that you spend with students?

41 the number of students for whom you are responsible?

42 the extent to which you are able to meet your students' academic needs?

43 the extent to which you are able to meet your students' affective needs?

44 the quality of your interactions with your students?

45 the extent to which the community recognizes and appreciates its educators?

46 the adequacy of financial support provided your school by the community?

47 the understanding of your school's program by parents and the community?

48 the community's involvement in your school's program?

49 the methods used to communicate with the community about your school?

50 the methods used to report student progress to parents?

Assumptions about Conditions of Effective Schooling

Directions: Below is a list of conditions which are said to be necessary for effective schooling. Please indicate *your* feelings about the *necessity* of each condition. Use the following code and rows 51–78 of answer sheet B.

(0) = Strongly disagree
(1) = Disagree
(2) = No strong feeling
(3) = Agree
(4) = Strongly agree

Staff Roles

51 There is role differentiation among teachers according to individual interests, knowledge, experience and expertise.

52 Teacher competencies are recognized as varying from one subject field to another, and from one media and/or method of instruction to another.

53 The principal tends to be an educational leader rather than a building manager.

54 The staff teacher is a cooperative team member rather than an independent ruler of a classroom.

55 Open communication and cooperative decision-making among the staff are fostered by the administrative structure of the school.

56 Teachers spend time during the school day planning and evaluating instructional activities as well as actually teaching.

57 The staff puts effort into research and development activities essential to continuous improvement of educational practice.

58 Evaluation and feedback are carried out both among staff members and between staff and students to improve learning and the instructional program.

59 The staff employs systematic problem-solving processes in order to identify and satisfy the educational needs of individual students.

Students' Learning Program

60 A set of schoolwide goals and a coordinated educational program is established for the building as a whole.

61 Provisions are made for differences in students' rate of learning, style of learning and other characteristics.

62 Students are placed in multiaged, multigraded classes.

63 The educational program for one student varies from that of another student.

64 Prior to instruction, each student's level of achievement, learning style, and motivation are assessed by the use of criterion-reference tests, observation schedules, or work samples.

65 Specific instructional objectives are set for each student to attain over a short period of time.

66 The amount of teacher direction and student interaction in instructional activities is varied to meet individual student needs.

67 The use of materials, equipment, resources, and direct experience is varied to meet individual student needs.

68 The amount of time spent in different types and sizes of learning groups is varied to meet individual student needs.

69 Results of the standardized norm-referenced tests of educational achievement and intellectual ability are used for improving the instructional program rather than for categorizing and grading students.

The Building and Its Resources

70 The school building allows ready access to library, audio visual, and other instructional resources.

71 The physical space configuration of the school building encourages varied types of grouping and learning activities.

72 A variety of quality printed materials, audio visual resources, and other supplementary materials is used regularly.

73 A variety of assessment devices and strategies is used regularly.

Resources Outside the School

74 The staff regularly shares creative ideas, materials, and instructional approaches with staffs of other schools.

75 The efforts of the staff are articulated with those of other schools and agencies such as state education departments, teacher education institutions, etc., in order to foster and sustain educational improvement.

76 Contact with parents is a two-way process; there is a free flow of information to and from the school.

77 Many avenues of communication between the school and home are used in addition to report cards and parent-teacher conferences.

78 Parent contact is regular concerning students' day-to-day progress rather than irregular, occurring only when difficulties are encountered.

18

Assumptions about Learning and Knowledge

Directions: According to the code below, indicate on answer sheet B, rows 81–108 the phrase which best represents *your* own feelings about each statement.

(0) = Strongly disagree
(1) = Disagree
(2) = No strong feeling
(3) = Agree
(4) = Strongly agree

ASSUMPTIONS ABOUT CHILDREN'S LEARNING

Motivation

81 Children are innately curious and will explore their environment without adult intervention.

82 Exploratory behavior is self-perpetuating.

Conditions for Learning

83 The child will display natural exploratory behavior if he is not threatened.

84 Confidence in self is highly related to capacity for learning and for making important choices affecting one's learning.

85 Active exploration in a rich environment, offering a wide array of manipulative materials, will facilitate children's learning.

86 Play is not distinguished from work as the predominant mode of learning in early childhood.

87 Children have both the competence and the right to make significant decisions concerning their own learning.

88 Children will be likely to learn if they are given considerable choice in the selection of the materials they wish to work with and in the choice of questions they wish to pursue with respect to those materials.

89 Given the opportunity, children will choose to engage in activities which will be of high interest to them.

Social Learning

90 When two or more children are interested in exploring the same problem or the same materials, they will often choose to collaborate in some way.

91 When a child learns something which is important to him, he will wish to share it with others.

Intellectual Development

92 Concept formation proceeds very slowly.

93 Children learn and develop intellectually not only at their own rate but in their own style.

94 Children pass through similar stages of intellectual development, each in his own way and at his own rate and in his own time.

95 Intellectual growth and development take place through a sequence of concrete experiences followed by abstractions.

96 Verbal abstractions should follow direct experience with objects and ideas, not precede them or substitute for them.

Evaluation

97 The preferred source of verification for a child's solution to a problem comes through the materials he is working with.

98 Errors are necessarily a part of the learning process; they are to be expected and even desired, for they contain information essential for further learning.

99 Those qualities of a person's learning which can be carefully measured are not necessarily the most important.

100 Objective measures of performance may have a negative effect upon learning.

101 Learning takes place when a child is fully involved in an activity and is best assessed intuitively, by direct observation.

102 The best way of evaluating the effect of the school experience on the child is to observe him over a long period of time.

103 The best measure of a child's work is his work.

ASSUMPTIONS ABOUT KNOWLEDGE

104 The quality of being is more important than the quality of knowing; knowledge is a means of education, not its end. The final test of an education is what one *is*, not what one *knows*.

105 Knowledge is a function of one's personal integration of experience and therefore does not fall into neatly separate categories or "disciplines."

106 The structure of knowledge is personal and idiosyncratic; it is a function of the synthesis of each individual's experience with the world.

107 Little or no knowledge exists which is essential for everyone to acquire.

120

108 It is possible, even likely, that an individual may learn and possess knowledge of a phenomenon and yet be unable to display it publicly. Knowledge resides with the knower, not in its public expression.

Thank you very much for your cooperation in completing these questionnaires.

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IGE Evaluation Phase I
Unit Staff Questionnaires

CONTENTS: 1 questionnaire booklet
1 answer sheet (C)
1 pencil

WHO SHOULD COMPLETE THE QUESTIONNAIRES?

Answer the questions below to determine whether or not you need to respond to the questionnaires.

- are you a staff member of the unit from which *Grade 5* students were selected for testing in the evaluation?
- are you assigned to this unit at least 1/3 time?
- were you assigned to this unit at least 1/3 time last year?
- are you directly involved in planning instruction for the students of this unit in the areas of reading and/or mathematics and/or language arts?

If you answered *yes* to *all four* questions, please complete the questionnaires enclosed. If you answered *no* to any question, do not complete the questionnaires; simply return the packet intact to your principal or other person in charge of the evaluation. It is not necessary for aides to complete these materials.

RETURNING MATERIALS:

Replace the completed answer sheet in this envelope, seal the envelope if you wish, and return it to your unit leader. The set of unit packets should then be given to your principal for return to the Wisconsin Research and Development Center. Please do not return the questionnaire booklet.

the Wisconsin Research and Development Center for Cognitive Learning
1025 West Johnson Street · Madison, Wisconsin 53706

Source of Questionnaires

Instruction and Research Unit (Learning Community) Structure and Function
Role of the Staff Teacher

Adapted from Ironside, R. A. The 1971-72 nationwide installation of the multiunit/IGE model for elementary schools: A process evaluation. (OEC-0-71-3705) Princeton: Educational Testing Service, 1972. ED 066 623

Instructional Practi[illegible] in Reading, Mathematics and Language Arts

Adapted from [illegible]riginal questionnaire, *Survey of the Rate, Media, Group[illegible]d Learner Assessment in an Instructional Program* by G. [illegible].s Fox, Jr. The original questionnaire was based on De[illegible]lt, M. V. Descriptor for individualized instruction. Madison: Wisconsin Center for the Analysis of Individualized Instruction, 1973.

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Center Contract No. NE-C-00-3-0065

INTRODUCTION

The Wisconsin R & D Center is appreciative of the special effort and additional time staff members of units/learning communities containing Grade 2 students selected for the testing program are contributing to the nationwide evaluation of IGE. Since the testing component of the evaluation is focused on students in your unit, it is necessary to request specific information about the instructional program in your unit.

WHO SHOULD COMPLETE THE QUESTIONNAIRES?

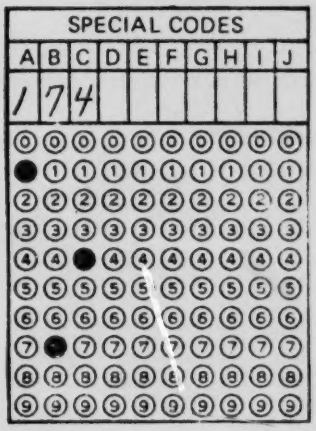
All professional staff members of the unit who were assigned at least 1/3 time to the unit in the 1976-77 and 1977-78 school years and who were directly involved in planning for instruction in reading and/or mathematics and/or language arts should respond to the unit staff questionnaires. It is not necessary for aides to complete these materials.

ID NUMBER

Your unique staff ID number appears in the upper right hand corner on the outside of this packet. The ID number for your *unit* packet should be the same number as the one which appears on your *staff* packet.

Record your ID number in columns A, B, and C of the Special Code area on answer sheet C before you begin working on the questionnaire. Place the numbers in the space provided and darken the corresponding circles on the grid as shown in the example. (Instructions for marking a unit ID on answer sheet D appear on page 13 of this booklet.)

Example



MARKING ANSWER SHEETS

The #2 pencil provided in the packet must be used for all parts of the answer sheet, including ID number. Answer spaces should be filled in darkly and completely.

QUESTIONNAIRE CONTENT AND WORKING TIME

The first two questionnaires, to be answered on answer sheet C by individual unit staff members, pertain to staff roles and to implementation practices in the areas of reading, mathematics, and language arts. The third questionnaire, to be completed by consensus of the unit staff using answer sheet D, requests information about the structure and function of the unit as a whole. A working copy of this questionnaire is included in your booklet; the unit leader's packet *only* contains answer sheet D. Estimated total working time for all three questionnaires is 2 hours.

Questionnaire	Estimated Working Time	Answer Sheet	Who Completes?
Role of the Staff Teacher	10 minutes	C, rows 1–18	Individual unit staff members
Instructional Practices in Reading, Mathematics, and Language Arts	60 minutes	C rows 21–135	Individual unit staff members
Instruction and Research Unit (Learning Community) Structure and Function	50 minutes	D, rows 1–72	Unit as a group
	Total 120 minutes		

RETURNING MATERIALS

When you have completed the questionnaires, replace answer sheet C in this packet and return it to your unit leader. Answer sheet D should be returned in the unit leader's packet. The set of unit packets should then be returned to the principal (or other person responsible for the IGE evaluation). It is not necessary to return the questionnaire booklet.

Role of the Staff Teacher

Directions: Use answer sheet C, rows 1 — 18 for this questionnaire. The term "unit" is used throughout this questionnaire; as you read please substitute "learning community" or "team" if these terms are appropriate for your school.

1 Choose the *one* statement which best describes your regularly scheduled teaching activities in the unit.

(0) Teaching *various groups* of students, where the students are *multiaged and multigraded* all or most of the time

(1) Teaching *various groups* of students, where students are the *same age and in the same grade*

(2) Teaching a *particular group* in the unit, where students are *multiaged*; in effect, a group within the unit or a self-contained class

(3) Teaching a *particular group* in the unit, where students are of the *same age and grade*; in effect, a group within the unit or a self-contained class

2 Of all the students in your unit, with what percentage do you have regularly scheduled instructional contact?

(0) 0-9%
(1) 10-19%
(2) 20-29%
(3) 30-39%
(4) 40-49%
(5) 50-59%
(6) 60-69%
(7) 70-79%
(8) 80-89%
(9) 90-100%

3 Is there a particular group of students in the unit who are "yours"?

(0) No
(1) Yes

If you marked (1) *Yes* for question 3, please indicate which group or groups are "yours" by marking (0) *No* or (1) *Yes* for questions 4-8.
If you marked (0) *No*, skip questions 4-8.

4 Homeroom group (at start of day and perhaps at end of day)

5 A group for parent contact, parent conferences, progress reports

6 A group for whom the total school experience is monitored; guidance is offered

7 A particular group taught daily in a given subject area

8 A classroom group (self-contained) which is taught most of the day

For which areas have you been a resource person *in the unit?* That is, have you taken on any "specialties" within the unit? Mark (0) *No* or (1) *Yes* for questions 9–17.

9 A subject matter area on a permanent basis

10 Certain topics within a subject matter area

11 Assessment of students' needs, performance, and progress

12 Teaching methods in class-sized or large groups

13 Teaching methods in medium, small, or tutorial groups

14 Plans and methods for grouping unit students for instruction

15 Preparing and/or gathering instructional objectives

16 Developing or gathering instructional materials

17 Relating to parents and answering parent information needs

18 Do you plan and/or teach a subject area in more than one unit and thus serve as a specialist *for the school?*

(0) No
(1) Yes

Instructional Practices in Reading, Mathematics, and Language Arts

Directions: This questionnaire concerns the learners in your unit and the curriculum areas of reading, mathematics and language arts. The questionnaire must be answered separately for each of the three curriculum areas. For purposes of continuity in thinking about each area, you will need to answer all questions in one area before going on to the next. That is, complete the entire questionnaire for reading first; then go through the questionnaire again for mathematics and finally, repeat for language arts. Use answer sheet C as follows:

Curriculum area	Rows on Answer Sheet C
Reading	R21 - R55
Mathematics	M61 - M95
Language Arts	L101 - L135

The term "unit" is used throughout this questionnaire; as you read please substitute "learning community" or "team" if these terms are appropriate for your school.

RATE/PROGRAM STRUCTURE

Respond for the reading area in rows R21 - R28.
Repeat in rows M61 - M68 for mathematics.
Repeat in rows L101 — L108 for language arts.

R21 M61 L101 To what extent are there differences among the learners' rate of progress in this curriculum area?

(0) Not at all
(1) Some progress faster or slower than the majority
(2) Groups move through the program at different rates
(3) Most learners differ in their rates of progress
(4) All learners progress at different rates of progress

R22 M62 L102 What portion of the learners can determine their own rates of progress in this curriculum area?

(0) None
(1) Some
(2) About half
(3) Most
(4) All
(5) All learners for part of the program

R23 M63 L103 Can a learner leave this curriculum area without satisfying minimum requirements?

(0) No
(1) Yes

R24 M64 L104 Are there certain minimum requirements that all students must master in this area?

(0) No
(1) Yes

R25 M65 L105 If your answer to the previous question was (1) *Yes*, what part of the minimum requirements in this area can be satisfied through pretests?

(0) None
(1) Some
(2) About half
(3) Most
(4) All

R26 M66 L106 From the learner's point of view, is the *sequence* of the specific instructional objectives evident in this curriculum area?

(0) Seldom evident
(1) Sometimes evident
(2) Frequently evident
(3) Almost always evident

R27 M67 L107 From the learner's point of view, is the *interrelationship* of the specific instructional objectives clear for this curriculum area?

(0) Seldom clear
(1) Sometimes clear
(2) Frequently clear
(3) Almost always clear

R28 M68 L108 From the learner's point of view, are activities in this curriculum area *on any one day* interrupted by work in other curriculum areas?

(0) Seldom interrupted
(1) Sometimes interrupted
(2) Frequently interrupted
(3) Almost always interrupted

LEARNER ASSESSMENT

Respond for reading in rows R29-R39.
Repeat for mathematics in rows M69-M79.
Repeat for language arts in rows L109-L119.

How are learners' *skills and concepts* assessed in this curriculum area?

Mark (0) *No* if the type of assessment below is *not* used.
Mark (1) *Yes* if the type of assessment *is* used.

R29 M69 L109 Pretests (tests before instruction on a topic)

R30 M70 L110 Internal tests (tests while instruction occurs on a topic)

R31 M71 L111 Posttests (tests after instruction on a topic)

R32 M72 L112 Conferences

R33 M73 L113 Student products (worksheets, projects)

R34 M74 L114 Standardized test results

R35 M75 L115 Classroom observations

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How are *other* learner characteristics assessed for this curriculum area? Listed below are four types of assessment:

Objective based tests
Conferences
Student products (worksheets, projects)
Classroom observations

Use this code to indicate *how many* of these four types of assessment are used in informally assessing learner characteristics in this curriculum area.

(0) None of these types of assessment is used
(1) One of these types of assessment is used
(2) Two of these types of assessments are used
(3) Three of these types of assessments are used
(4) All four types of assessment are used

R36 M76 L116 Interests, attitudes, motivation

R37 M77 L117 Constructive or creative abilities

R38 M78 L118 Interpersonal relating abilities (ability to get along with self and others)

R39 M79 L119 Learning style

MATERIALS/MEDIA

Respond for the reading area in rows R40 – R48.
Repeat for mathematics in rows M80 – M88.
Repeat for language arts in rows L120 – L128.

Listed below are six types of *reading-writing* materials:

Single textbook
Multitexts
Programmed materials
Workbooks
Computer terminal
Materials written by learners

R40 M80 L120 How many of these types of materials are used in this curriculum area?

(0) None of the above types of reading-writing materials is used
(1) One type is used
(2) Two types are used
(3) Three types are used
(4) Four types are used
(5) Five types are used
(6) All six types of reading-writing materials are used

Note: Do not mark in rows 41, 81, and 121.

8

Listed below are seven types of *audio-visual* materials:

Films
Filmstrips
Tapes
Records
Television
Overhead projectors
Videotapes

R42 M82 L122 How many of these types of materials are used in this curriculum area?

(0) None of the above types of audio-visual materials is used
(1) One type is used
(2) Two types are used
(3) Three types are used
(4) Four types are used
(5) Five types are used
(6) Six types are used
(7) All seven types of audio-visual materials are used

Listed below are four types of *manipulative* materials:

Building tools
Games
2-dimensional materials
3-dimensional materials

R43 M83 L123 How many of these types of materials are used in this curriculum area?

(0) None of the above types of manipulative materials is used
(1) One type is used
(2) Two types are used
(3) Three types are used
(4) All four types are used

Listed below are three types of *no media situations:*

Discussions
Lectures
Learner's meditations (thinking alone without books, etc.)

R44 M84 L124 How many of these types of no media situations are used in this curriculum area?

(0) None of the above types of no media situations is used
(1) One type is used
(2) Two types are used
(3) All three types are used

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About what percentage of the learner's instructional time in this area is spent using the types of materials/media below?

Mark the answer sheet according to the following code; the individual percents for the four kinds of materials/media should add up to 100%.

(0) 0-9%	(5) 50-59%
(1) 10-19%	(6) 60-69%
(2) 20-29%	(7) 70-79%
(3) 30-39%	(8) 80-89%
(4) 40-49%	(9) 90-100%

Use the space below to work out the percents. Then transfer to the answer sheet using the code.

	Materials/Media	Reading	Math	Lang Arts	
R45 M85 L125	Reading-writing materials	_____	_____	_____	% of time
R46 M86 L126	Audio-visual materials	_____	_____	_____	% of time
R47 M87 L127	Manipulative materials	_____	_____	_____	% of time
R48 M88 L128	No materials/media situations	_____	_____	_____	% of time
		100%	100%	100%	

Respond for the reading area in rows R49-R55.
Repeat for mathematics in rows M89-M95.
Repeat for language arts in rows L129-L135.

About what percentage of time do learners in your unit spend in each kind of learning group below? Mark the answer sheet according to the following code; the individual percents for the seven kinds of groups should add up to 100%.

Note: In order to respond to this question accurately you will need to think of the group from the *learner's point of view;* you will also need to distinguish between a group of learners merely *seated together* and a group *interacting* with each other and/or with one or more instructors. Consider this example: 6 learners are seated at a small table. They are all working on worksheets but are not interacting as they work. There is no instructor with them. This learning group would then be described as having *one learner, no instructor* because from the learner's point of view he is working alone.

(0) 0-9%
(1) 10-19%
(2) 20-29%
(3) 30-39%
(4) 40-49%
(5) 50-59%
(6) 60-69%
(7) 70-79%
(8) 80-89%
(9) 90-100%

Use the space below to work out the percents. Then transfer to the answer sheet using the code.

	Type of learning group	Reading	Math	Lang Arts
R49 M89 L129	One learner, no instructor	_____	_____	_____ % of time
R50 M90 L130	One learner, one instructor	_____	_____	_____ % of time
R51 M91 L131	Group of 2-7 learners, no instructor	_____	_____	_____ % of time
R52 M92 L132	Group of 2-7 learners, one instructor	_____	_____	_____ % of time
R53 M93 L133	Group of 8-20 learners, one instructor	_____	_____	_____ % of time
R54 M94 L134	Group of 21-40 learners, one or more instructors	_____	_____	_____ % of time
R55 M95 L135	Over 40 learners, one or more instructors	_____	_____	_____ % of time
		100%	100%	100%

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Instruction and Research Unit (Learning Community) Structure and Function

Directions: This questionnaire is concerned with unit operations as a whole and therefore must be completed by the unit staff as a group. After the unit members come to a consensus about each question, answers should be recorded on answer sheet D. (Only the packet labeled "unit leader" contains answer sheet D.)

The term "unit" will be used throughout this questionnaire; however, please substitute the terms "learning community," or "team" as you read if these terms are appropriate for your school.

ID Number: Please place a 2 in column A of the Special Code area on answer sheet D and darken the circle in the grid below. This ID number indicates that your unit contains Grade 2 students to be tested in the evaluation.

SCHEDULE/UNIT MEETINGS

1 How many hours *per week* of release time are currently *scheduled* during the school day for unit staff members to plan together as a unit?

(0) 0
(1) 1
(2) 2
(3) 3
(4) 4
(5) 5
(6) 6
(7) 7
(8) 8
(9) 9 or more

How many hours per week of *additional* release time are provided during the school day for planning as individuals or pairs etc.?

2 For the unit leader?

(0) 0
(1) 1
(2) 2
(3) 3
(4) 4
(5) 5
(6) 6
(7) 7
(8) 8
(9) 9 or more

3 For staff teachers?

(0) 0
(1) 1
(2) 2
(3) 3
(4) 4
(5) 5
(6) 6
(7) 7
(8) 8
(9) 9 or more

4 Do you have regularly scheduled unit meetings?

(0) No
(1) Yes

If you answered (1) *Yes* for question 4, please respond to questions 5—26.
If you answered (0) *No*, go on to question 27.

5 How many hours per week does the unit meet? (total of release time *during* school plus time *before* and/or *after* school)

(0) 1/2 hour
(1) 1 hour
(2) 2 hours
(3) 3 hours
(4) 4 hours
(5) 5 hours
(6) 6 hours
(7) 7 hours
(8) 8 hours
(9) 9 or more hours

6 What is the total number of people who usually attend your unit meetings?

(0) 2-3
(1) 4-5
(2) 6-7
(3) 8-9
(4) 10-11
(5) 12 or more

Indicate which personnel attend your unit meetings on a *permanent and regular* basis. Mark (0) *No* or (1) *Yes* for questions 7—15.

7 Unit leader

8 Unit teachers

9 Unit aides

10 Interns, student teachers

11 Principal

12 One or more instructional materials staff members (for example, media director, librarian)

13 One or more pupil personnel services staff members (for example, guidance counselor, social worker)

14 One or more special education staff members (for example, learning disabilities teacher, speech therapist)

15 One or more curriculum consultants or specialists (for example, remedial reading teacher, music teacher)

16 Who usually chairs your unit meetings?

(0) Unit leader
(1) A unit teacher (other than the unit leader)
(2) Principal
(3) Other person
(4) The position of chairperson is frequently rotated among the unit members

17 Is an agenda prepared for each meeting?

(0) No
(1) Yes

18 If you answered (1) *Yes* for question 17, is the agenda printed in advance?

(0) No
(1) Yes

19 Is a formal log or set of minutes kept for each unit meeting?

(0) No
(1) Yes

20 If you answered (1) *Yes* for question 19, are minutes or reports of meetings distributed?

(0) No
(1) Yes

21 If you answered (1) *Yes* for question 20, to whom are the minutes distributed?

(0) Unit staff only
(1) Unit staff and Instructional (Program) Improvement Committee
(2) Unit staff and other selected staff members
(3) Total staff of building

UNIT FUNCTION

Roughly what percentage of unit meeting time is directed to the following broad activities? Mark the answer sheet according to the code below; the individual percents should add up to 100%

(0) 0-9%
(1) 10-19%
(2) 20-29%
(3) 30-39%
(4) 40-49%
(5) 50-59%
(6) 60-69%
(7) 70-79%
(8) 80-89%
(9) 90-100%

Use this section to work out the percents; then transfer to the answer sheet using the code.

_____

22 Planning for instruction (work on materials, grouping) _____% of time

23 Making managerial and administrative arrangements (managing time, space, equipment, personnel) _____% of time

24 Evaluating student and staff efforts _____% of time

25 Individual staff preparation (time set aside during unit meetings for teachers to work alone) _____% of time

26 Inservice of unit staff _____% of time

100%

USE OF AIDES

27 Do you have one or more *paid* aides assigned to your unit on a regularly scheduled basis?

(0) No
(1) Yes

28 If you answered (1) *Yes* to question 27, indicate the number of *fulltime equivalent* aides available. (Example: two half-time aides would make one fulltime equivalent.)

(0) one half-time aide
(1) one fulltime equivalent
(2) 1 and 1/2 fulltime equivalents
(3) 2 fulltime equivalents
(4) 2 and 1/2
(5) 3
(6) 3 and 1/2
(7) 4
(8) 4 and 1/2
(9) 5 or more fulltime equivalents

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If you answered (1) *Yes* to question **27**, use the following code to indicate how the statements below apply to the paid aide(s) assigned to your unit. If you answered (0) *No*, go to question **38**.

(0) Applies to few or no aides in our unit
(1) Applies to some aides in our unit
(2) Applies to most or all aides in our unit

29 Has had formal training as an aide

30 Has clearly defined responsibilities in the unit

31 Has a wide range of tasks in and for the unit

32 Has assigned tasks which include definite *instructional* activities with children

33 Is evaluated by the unit staff and/or principal

34 Usually attends the unit meetings

35 Is included in inservice training for the unit as a whole

36 Is an aide whom we hope we will have again next year

37 Is kept very busy by unit needs

38 Do you have one or more *volunteer* aides assigned to your unit on a regularly scheduled basis?

(0) No
(1) Yes

39 If you answered (1) *Yes* to question **38**, indicate the total number of hours *per week* volunteer aides donate to your unit; for example, if three aides each spend 4 hours per week in your unit, the total time donated is 12 hours.

(0) 1-9
(1) 10-19
(2) 20-39
(3) 40-59
(4) 60-89
(5) 90-119
(6) 120-149
(7) 150-199
(8) 200-250
(9) Over 250

If you answered (1) *Yes* to question **38**, use the following code to indicate how the statements below apply to the volunteer aide(s) assigned to your unit. If you answered (0) *No*, skip questions **40–48** and go to the RECORD KEEPING section.

(0) Applies to few or no aides in our unit
(1) Applies to some aides in our unit
(2) Applies to most or all aides in our unit

40 Has had formal training as an aide

41 Has clearly defined responsibilities in the unit

42 Has a wide range of tasks in and for the unit

43 Has assigned tasks which include definite *instructional* activities with children

44 Is evaluated by the unit staff and/or principal

45 Usually attends the unit meetings

46 Is included in inservice training for the unit as a whole

47 Is an aide whom we hope we will have again next year

48 Is kept very busy by unit needs

RECORD KEEPING

For which curriculum areas is an individual record of achievement (for example, profile card, chart, computer system) of specific instructional objectives kept for each student in your unit?

49 Reading

(0) No
(1) Yes

50 Mathematics

(0) No
(1) Yes

51 Language arts

(0) No
(1) Yes

52 For how many *additional* curriculum areas (for example, social studies, music) are individual records of achievement of specific instructional objectives kept?

(0) 0
(1) 1
(2) 2
(3) 3
(4) 4 or more

GROUPING/REGROUPING

In teaching the following curriculum areas, which *one* of these conditions is most typical of your unit?

53 Reading
- (0) teaching a heterogeneous group of 20 to 30 students on a regular basis
- (1) teaching groups of any size based on general achievement/ability levels, and teaching such groups on a regular basis
- (2) supervising each child in an individualized system (working on his own), regardless of the number of students involved at any given time
- (3) teaching groups of changing composition and size (including tutorial, independent study; small, medium, class-size, and large groups), based upon periodic reassessment and regrouping

54 Mathematics — Choose (0), (1), (2), or (3) as above.

55 Language arts — Choose (0), (1), (2), or (3) as above.

How often are the students in your unit regrouped on the basis of a common need for work on a specific instructional objective in these curriculum areas?

56 Reading
- (0) Daily
- (1) Weekly
- (2) Every 2-3 weeks
- (3) Monthly
- (4) Quarterly
- (5) At semester
- (6) Groups remain basically the same throughout the year

57 Mathematics — Choose (0), (1), (2). . . (6) as above

58 Language arts — Choose (0), (1), (2). . . (6) as above

How does the group of students and teacher change when regrouping occurs? Indicate the regrouping condition *most likely* to occur in your unit after a student attains a specific instructional objective in these curriculum areas.

59 Reading
- (0) The student remains with basically the *same* group of students and has the *same* teacher
- (1) The student remains with basically the *same* group of students and has a *new* teacher
- (2) The student joins a *new* group of students and has the *same* teacher
- (3) The student joins a *new* group of students and has a *new* teacher

60 Mathematics — Choose (0), (1), (2), or (3) as above.

61 Language arts — Choose (0), (1), (2), or (3) as above. 19

62 *For the reading area only*, please indicate how you responded to questions 53, 56, and 59.

(0) Our answers refer to our *total* program of reading instruction.
(1) Our answers refer to only *part* of our reading instructional program (for example, to "skill" group instruction only, but not to instruction in a basal series).

NOTE: QUESTIONS 63–71 REFER *ONLY* TO THE GRADE 2 STUDENTS IN YOUR UNIT. PLEASE ANSWER SPECIFICALLY FOR GRADE 2.

TIME ALLOCATION

How many minutes per *day* on the average does your unit allocate to Grade 2 students for instruction and related follow-up activities (e.g., worksheet completion, independent activities) in these curriculum areas?

63 Reading
(0) 0-30 minutes
(1) 31-60 minutes
(2) 61-90 minutes
(3) 91-120 minutes
(4) more than 120 minutes

64 Mathematics Choose (0), (1), (2), (3), or (4) as above

65 Language arts Choose (0), (1), (2), (3), or (4) as above

Is the total time indicated above for Grade 2 instruction in these curriculum areas scheduled in one continuous time block each day, or is it broken down into shorter, separate (interrupted by other curriculum areas) time periods?

66 Reading
(0) One continuous time block
(1) Two separate time blocks of approximately equal length
(2) One long time block and one or more short (5-15 minutes) time blocks
(3) Several short (5-15 minutes) time blocks throughout the day

67 Mathematics Choose (0), (1), (2), or (3) as above.

68 Language arts Choose (0), (1), (2), or (3) as above.

OBJECTIVES

What is the *maximum* number of specific instructional objectives an individual Grade 2 student in your unit could attain in these curriculum areas in *one school year?*

69 Reading
(0) 0-9 objectives
(1) 10-19 objectives
(2) 20-39 objectives
(3) 40-59 objectives
(4) 60-99 objectives
(5) 100-149 objectives
(6) 150-249 objectives
(7) 250-349 objectives
(8) 350 or more objectives

70 Mathematics Choose (0), (1), (2) . . . (8) as above

71 Language arts Choose (0), (1), (2) . . . (8) as above

72 How many people worked on this questionnaire?
(0) 1
(1) 2-3
(2) 4-5
(3) 6-7
(4) 8-9
(5) 10-11
(6) 12 or more

Thank you for your assistance in completing these questionnaires.

APPENDIX E

SAMPLES of
STUDENT EVALUATION MATERIALS

Grade 2 Student Testing Program and Schedule
IGE Evaluation Phase I--October 1977

Test Session	Test Group	Test	Working time for tests that have time limits*	Approximate Total Time*
1st	A	SFTAA--Tests 1, 2, 3, 4	28	31
	B	SFTAA--Tests 1, 2, 3, 4	28	31
	C	SFTAA--Tests 1, 2, 3, 4	28	31
	D	SFTAA--Tests 1, 2, 3, 4	28	31
2nd	A	CTBS Test 1--Reading Vocabulary		20
	B	CTBS Test 3--Reading Comprehension: Passages	21	26
	C	CTBS Test 8--Mathematics Concepts & Applications		30
	D	CTBS Test 7--Mathematics Computation	34	49
3rd	A	CTBS Test 2--Reading Comprehension: Sentences	20	25
	B	Self-Observation Scales (SOS)		25
	C	Locus of Control		25
	D	None	--	--

*in minutes. The Approximate Total Time for each test session includes only average instruction and working time. It does not include time required for recording identifying data on the test books (to be completed by teachers or aides), assembly of students into the test groups, and distributing and collecting test materials.

CTBS--Comprehensive Tests of Basic Skills, Form S, Level C

SFTAA--Short Form Test of Academic Aptitude, Level 1

Grade 5 Student Testing Program and Schedule
IGE Evaluation Phase I--October 1977

Test Session	Test Group	Test(s)	Working time for tests that have time limits*	Approximate Total Time* Subtests	Session
1st	A	SFTAA--Tests 1, 2, 3, 4	34		38
	B	SFTAA--Tests 1, 2, 3, 4	34		38
	C	SFTAA--Tests 1, 2, 3, 4	34		38
	D	SFTAA--Tests 1, 2, 3, 4	34		38
2nd	A	CTBS Test 1--Reading Vocabulary	14	24	
		CTBS Test 3--Spelling	12	22	46
	B	CTBS Test 2--Reading Comprehension	35		40
	C	CTBS Test 6--Mathematics Computation	40		46
	D	CTBS Test 7--Mathematics Concepts & Applications	35		40
3rd	A	Self-Observation Scales (SOS)			25
	B	CAA--Number Series		15	
		CAA--Number Relations		20	35
	C	CAA--Remembering Classes: Members		10	
		CAA--Omelet		20	30
	D	CAA--Picture Class Memory		10	
		Locus of Control		25	35

*in minutes. The Approximate Total Time for each test session includes only average instruction and working time. It does not include time required for recording identifying data on the answer sheets, assembly of students into the test groups, and distributing and collecting test materials.

CTBS--Comprehensive Tests of Basic Skills, Form S, Level 2

SFTAA--Short Form Test of Academic Aptitude, Level 3

CAA--Concept Attainment Abilities

IGE Evaluation Phase I
Student Test Materials for
Grade 5 Group B

	CONTENTS:	TEST SESSION NEEDED FOR		
	1 Test Administrator's Manual	1	2	3
DO NOT RETURN TO R&D CENTER	_____ No. 2 lead pencils	1	2	3
	_____ CTBS and SFTAA combination answer sheets (blue)	1	2	
DO NOT RETURN TO R&D CENTER	_____ CTBS Level 2 Form S test books	1		
DO NOT RETURN TO R&D CENTER	_____ SFTAA Level 3 test books		2	
	_____ CAA Number Series and Number Relations answer sheets (green)			3
DO NOT RETURN TO R&D CENTER	_____ CAA Number Series and Number Relations test books			3

AFTER ALL TESTING FOR GRADE 5 GROUP B HAS BEEN COMPLETED:

- Use the CONTENTS list above as a checklist for replacing materials in this envelope.
- Set aside materials that are marked DO NOT RETURN TO R&D CENTER.
- Replace in this envelope all remaining test materials.
  Return the envelope to your principal for mailing to the Wisconsin R&D Center.

the Wisconsin Research and Development Center for Cognitive Learning
1025 West Johnson Street · Madison, Wisconsin 53706

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APPENDIX F

FALL 1977 CORRESPONDENCE to PHASE I PARTICIPANTS

the
Wisconsin
Research and Development Center
for Cognitive
Learning

the University of Wisconsin · 1025 West Johnson Street · Madison, Wisconsin 53706

September 13, 1977

MEMO

TO: Principals of schools in Phase I of the IGE Evaluation

FROM: Thomas A. Romberg TAR
Director, IGE Evaluation

RE: Welcome back/gifts for participating schools/overview of activities

We hope that you and your staff have enjoyed a refreshing and stimulating summer and that the 1977-78 school year will be a fruitful one.

As you recall, late last spring the R & D Center announced plans for an extensive four-phase evaluation of IGE and invited your participation in Phase I, a comprehensive study of some 200 schools' IGE implementation. We received your affirmative reply earlier this year and appreciate your willingness to assist in the evaluation.

Each school participating in Phase I will receive a gift copy of the definitive book on IGE: *Individually Guided Elementary Education: Concepts and Practices* edited by H. J. Klausmeier, R. A. Rossmiller, and M. Saily. In addition, you may choose for your school any *one* of the three gift selections described on the other side and listed on the enclosed business reply post card. Please make your choice by October 1. Gift materials will be mailed late in the year.

It might be useful to review here the general procedures of Phase I, scheduled for the two week period October 3-14. (A detailed schedule and directions for the evaluation will be mailed to you next week.) During the first week, you, your building staff, and the IIC (PIC) will be asked to respond to a set of questionnaires; it will also be necessary during the first week for staff associated with units/staff groups from which Grade 2 and 5 students will be tested to make preparations for the testing program. During the second week up to 50 students at each of these grade levels will be tested for achievement, attitude and aptitude; in addition, staff of these units will be asked to respond to questionnaires concerning unit operations. Note that if you have self-contained classes at grades 2 and 5 rather than units, the staff groups for these levels will need to cooperatively complete the evaluation procedures.

Again, we thank you for your contribution to the evaluation program. If you have questions, please do not hesitate to call the evaluation staff at (608) 263-5548.

I E Evaluation Phase I

Gifts for Participating Schools

FRANKLIN ELEMENTARY SCHOOL SIMULATION SERIES

This series of 11 simulations focuses on problems commonly encountered by schools implementing IGE. In each simulation participants become actively involved in solving the simulation problem in a meeting and develop small-group problem-solving skills. Each simulation takes about two hours.

Simulations are designed for staffs of schools in changeover or refinement phases of implementation and for use in college courses. They can be conducted by principals, implementors, or teacher educators.

These are the titles of the simulations:

- Establishing IIC Operational Guidelines and Procedures
- Grouping Students for Learning
- Establishing a Systemwide Program Committee
- Establishing Decision-Making Guidelines for the IIC
- Organizing a Multiunit School
- Improving Instructional Practices
- Establishing a School Philosophy
- Establishing an Evaluation and Reporting Policy
- Using the Performance Objectives in Implementing IGE
- Managing Unit Time
- Establishing a Procedure for Allocating Money for Requisitioning Materials

THE LEADERSHIP SERIES IN IGE

The IGE Leadership Series is a major collection of IGE materials developed primarily for use in college courses and programs of prospective and experienced teachers, unit leaders, and principals. The materials can also be used advantageously in noncredit staff development programs in IGE schools.

Developed under the direction of Herbert J. Klausmeier with funds from the Sears-Roebuck Foundation, the Leadership Series presents established IGE principles and practices in nine sets of materials. Any three books from the series are to be selected for this gift choice.

A *The Teacher and Individually Guided Education.* E. Nussel, J. Inglis, W. Wiersma (322 pp, 1976). This book provides information for prospective and inservice teachers to learn about IGE and the teacher's role in IGE schools.

B *Child Development and Individually Guided Education.* G. Tagatz (212 pp, 1976). This book discusses theories of child development and relates them to IGE.

C *Evaluation of Instruction and Individually Guided Education.* W. Wiersma, S. Jurs (237 pp, 1976). Measurement and evaluation with application to IGE are treated. One chapter is devoted to reporting student achievement.

D *Objective-Based Reading.* W. Otto, R. Chester, (273 pp, 1976). This book features an objective-based reading program, the Wisconsin Design for Reading Skill Development as an example.

E *Individually Guided Mathematics.* T. Romberg (196 pp, 1976). This book is designed to help elementary teachers plan, implement, and evaluate individually guided mathematics instruction.

F *Individually Guided Science.* R. Haney, J. Sorenson (220 pp, 1977). This book is designed to help elementary teachers plan, implement, and evaluate individually guided science instruction.

G *Individually Guided Social Studies.* W. Bechtol, A. Conte (292 pp, 1976). This book is designed to help elementary teachers plan, implement, and evaluate individually guided social studies instruction.

H *The Unit Leader and Individually Guided Education.* J. Sorenson, M. Poole, L. Joyal (590 pp, 1976). Detailed information is presented to enable prospective and experienced unit leaders to learn about IGE and their key leadership roles including planning, implementing, and evaluating instruction with the other members of the unit staff.

I *The Principal and Individually Guided Education.* J. Lipham, M. Fruth (346 pp, 1976). This book is designed to provide prospective and experienced principals with the understandings and skills necessary for effective leadership in IGE schools. It includes eight case studies.

J *IGE in Elementary and Middle Schools: A Handbook for Implementors and College Instructors.* H. Klausmeier, et al (218 pp, 1977). This handbook spells out the many uses of the Leadership Series and selected R&D Center materials in teacher education programs and in staff development activities.

SET OF INDIVIDUALLY GUIDED MOTIVATION PRINT MATERIALS

Individually Guided Motivation (IGM) is a workable program designed to help teachers motivate children in elementary and middle schools. It was developed and tested under the direction of H. J. Klausmeier and has been used successfully in schools across the country. IGM has motivational-instructional procedures in 4 areas: independent reading, goal setting, tutoring, and self-directed prosocial behavior.

If you select this choice, you will receive:

1 copy *Individually Guided Motivation (text).* This 160-page book details the IGM program as well as the principles underlying it. The book is intended as a guide to implementors, for teachers using the program, and as a text for college courses on classroom motivation. (third revised edition)

1 copy *A System of Individually Guided Motivation.* This 28-page paper describes IGM and relates it to the broader instructional activities of a school. The paper includes a description of the IGM program as well as information on motivational principles, procedures for assessing motivation, instructional guides, and activities which can implement the motivational principles. It is useful for classroom teachers and for college instructors.

1 copy *Inservice Implementation Manual for IGM.* This 107-page manual is used by implementors and building-level IGM coordinators to conduct an inservice for IGM. The manual gives objectives, activities, planning guides, assessment information, and other guidelines for inservice sessions.

5 copies *IGM: Setting Individual Goals for Learning.* This is a 66-page guide for teachers who conduct individual goal-setting conferences with children to increase learning in various subject matter areas. The guide gives advice on preconference planning, suggestions for specifying goals a child might work toward, advice on selecting children to take part in the program, suggestions for using motivational principles in conferences, and ideas for evaluating the program.

5 copies *Tutoring Can Be Fun.* This 54-page guide is written especially for children who tutor younger children. It tells them what to expect when they tutor and how to handle typical problems.

5 copies *A Guide for Adult-Child Reading Conferences.* This 33-page handbook is for the noncertified adult aide who conducts individual conferences with children to increase their motivation to read independently. The guide is not technical.

GIFT SELECTION ORDER BLANK

Choose one of the three gift selections described in the attachments. Then mark your choice on this order card and return the card by October 1, 1977.

☐ Franklin Elementary School Simulation Series

☐ Any *three* books from the Leadership Series in IGE:

____A	____F
____B	____G
____C	____H
____D	____I
____E	____J

☐ Set of Individually Guided Motivation *print* materials

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September 24, 1977

TO: Principals of schools in Phase I of the IGE Evaluation

FROM: Thomas A. Romberg, Director
IGE Evaluation Project

RE: Evaluation materials/Schedule of activities

The Wisconsin R and D Center is pleased to have your cooperation and leadership in Phase I of the IGE Evaluation. This is the first comprehensive and nationwide evaluation of IGE as a system of education and thus the project is complex. We must rely on your careful administration of the evaluation procedures in your building for meaningful and accurate results.

In a few days the materials for the evaluation should arrive in your building via United Parcel Service. Please verify that the proper quantities of materials arrived by using the enclosed packing list. Contact the R and D Center *immediately* if there are missing or insufficient materials; call collect to the IGE Evaluation staff at (608) 263-5548.

You will recall that the staff component of the evaluation involves almost all of your professional staff; however, the student component is focused on one unit/learning community (or group of classes) at each of Grades 2 and 5. The unit/learning community leader *or* designated person for staff groups (in the case of self-contained classes) should receive the unit staff and student testing materials and coordinate the evaluation procedures. The unit/learning community leader or designated person should also receive the packet labeled "Unit leader."

Student Test Group Lists will be sent to you *separately* early next week. The Lists must be checked prior to the testing period.

Since the evaluation is extensive and because the student testing program is related to national norms we ask that you follow the enclosed schedule in administering the evaluation in your building. If you must deviate from the schedule for the *student testing program only*, please inform the R and D Center. Deviations in the staff's schedule are permissible. Three copies of the evaluation schedule are enclosed; please feel free to duplicate additional copies as needed for your staff.

Materials must be returned to the R and D Center via United Parcel Service according to the directions on the enclosed packing list. Please save the packing list to assist you in preparing the return shipment. Please also *save* the boxes and envelopes to use in returning materials.

Again, thank you for your assistance in Phase I of the IGE evaluation. The cooperation of you and your staff is essential to the project. We appreciate both your recognition of this fact and your willingness to participate.

P.S. Have you returned your gift selection order card? If not, please do so as soon as possible.

FIGURE I

IGE Evaluation Phase I

Schedule of Activities

Date	Activity	Who is involved?	Estimated time
Oct. 3-7	Complete General Staff Questionnaires	All continuing professional staff assigned to this building at least 1/3 time during the 1976-77 and 1977-78 school years.	100 minutes
Oct. 3-7	Complete Principal and IIC Questionnaires	Building principal and, if one exists, the Instructional (Program) Improvement Committee.	25 minutes
Oct. 3-7	Prepare for Student Testing Program	Staff assigned to the unit or staff groups in which Grade 2 and Grade 5 students will be tested.	as required
Oct. 10-14	Administer Student Testing Program	Grade 2 and Grade 5 students selected for testing as required; unit or staff groups as above - one person per test group.	as required
Oct. 10-14	Complete Unit Staff Questionnaires	Professional staff assigned to the unit or staff groups in which Grade 2 and Grade 5 students will be tested; only staff assigned to the unit at least 1/3 time during the 1976-77 and 1977-78 school years and directly involved in planning instruction for unit students in reading and/or math and/or language arts should respond.	120 minutes
Oct. 17-21	Administer Make-up Tests	Students who missed tests Oct. 10-14. Unit staff or staff groups as above.	as required
Oct. 17-21	Call R & D Center to report completion of the evaluation; R & D will then contact United Parcel Services	Principal or person assigned to coordinate the evaluation activities.	

School_____

IGE Evaluation Phase I

City_____ State_____

Packing List

	Quantity	ID Numbers
General Staff Questionnaire Envelopes	_____	_____
Unit Staff Questionnaire Envelopes *Note: Envelopes for unit leaders (or staff group coordinators) are specially marked*		
Unit (or staff groups) from which *Grade 2* students will be tested	_____	_____
Unit (or staff groups) from which *Grade 5* students will be tested	_____	_____
Principal and IIC Questionnaire Envelopes	_____	*none*
Grade 2 Student Test Materials Envelopes	_____	*see student test group rosters*
Grade 5 Student Test Materials Envelopes	_____	*see student test group rosters*

Please use this packing list to verify that there are enough evaluation materials for your building; report missing materials or insufficient quantities to the R & D Center immediately. Call collect (608-263-5548). *Save this list* to guide you in repacking the boxes for return shipment.

Materials are to be returned to the R & D Center via United Parcel Services in the same envelopes and the same boxes. *Please save them.* The boxes are pre-labeled; simply make certain the label for your school has been removed and that the R & D Center address is visible. When the boxes are packed, call the R & D Center collect (608-263-5548) and we will notify United Parcel Services to pick up the boxes at our expense.

DO NOT CALL UNITED PARCEL ON YOUR OWN.
We are not able to reimburse you for shipping.

IGE Evaluation Phase I

Directions for Checking the Test Group Lists

After you returned to us a form stating that your school would participate in Phase I of the IGE Evaluation, we asked that you complete Roster Forms for second and fifth graders in the 1977-78 school year.

Some schools reported having more than one unit (learning community, team) to which second or fifth graders would be assigned. Those schools received a telephone call so that Roster Forms or class lists could be obtained for only one unit at each grade level.

The enclosed Test Group Lists include all student names returned to the Center on Roster Forms or on class lists. Only students whose names are on the Test Group Lists should be tested. Do not add any names to the Test Group Lists.

There are two advance checks that must be made for the Grade 2 Test Group Lists and for the Grade 5 Test Group Lists separately. The first check (Section A below) is to be sure that only *eligible* students are named on the lists; the second check (Section B below) is to be sure there are *enough* students, at least 6 in each test group, to carry out the testing as planned.

Please do each of these checks twice, once for the Grade 2 Test Group Lists and again for the Grade 5 Test Group Lists.

A. Check for eligible students

1. Are all names on the Grade 2 (Grade 5) Test Group Lists for students who are second (fifth) graders during the 1977-78 school year?

   If YES, go to question 2.
   If NO for some students, cross those student names off the list.
   If NO for all students, immediately send rosters or class lists for the proper grade and for the unit in which testing is to occur to the IGE Evaluation staff at the R & D Center. Cross off the names of all students new to your school. We will return to you Test Group Lists with names of continuing students randomly assigned on new Test Group Lists.

2. Are all names on the Test Group Lists for students who are still enrolled in your school?

   If YES, go to question 3.
   If NO, cross off the names of students no longer enrolled in your school.

3. For schools with more than one unit at Grade 2 or Grade 5.
   Are all names on the Grade 2 (Grade 5) Test Group Lists for students assigned to the unit selected for testing?

   If YES, go on to Section B.
   If NO, cross off names of students no longer assigned to the unit selected for testing.

B. Check for enough students

1. Does each Grade 2 (Grade 5) Test Group List have six or more names remaining? (Note that each Test Group List must have at least 6 names; the Test Group Lists may have varying totals.)

   If YES, the advance checking of Test Group Lists for Grade 2 (Grade 5) is completed.

   If NO,

   a. For schools that have fewer than 24 students *total* after completing Section A check. (That is, for schools in which it is not possible to have at least six students in each group.) Call collect to the IGE Evaluation staff at (608) 263-5548 for specific information.

   b. For schools that initially had more than 50 Grade 2 (Grade 5) students. You received a list titled TEST ALTERNATES. Names and ID numbers from that list, in the order in which they appear, should be added to Test Group Lists with fewer than six names remaining. Repeat the procedure for each Test Group List--A, B, C, D--as needed until each group has at least six names. You should not make the groups of equal size.

   c. For schools that initially had 24 to 50 Grade 2 (Grade 5) students. You need to move student names from the bottom of the longest list to the shortest list until the shortest Test Group List has six names. You should not make the groups of equal size. Five examples have been provided for you.

EXAMPLES FOR B.1.c.

Number of student names on Test Group Lists after Section A check	Test Group sizes after Section A check				Action	Resulting Test Group sizes			
	A	B	C	D		A	B	C	D
25	6	8	6	5	Move last name from Group B list to Group D list	6	7	6	6
26	6	11	4	5	First, move last two names (10th and 11th) from Group B list to Group C list. Second, move last name (9th) from Group B list to Group D list.	6	8	6	6
29	2	11	4	12	First, move last four names from Group D list to Group A list. Second, move last two names (10th and 11th) from Group B list to Group C list.	6	9	6	8
32	5	6	10	11	Move last name from Group D list to Group A list.	6	6	10	10
32	13	9	3	7	Move last three names from Group A list to Group C list.	10	9	6	7

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September 1977

TO: Principal

FROM: IGE Evaluation Staff

RE: Distribution of evaluation materials

You, as principal, should receive two envelopes: one Principal and IIC Questionnaires envelope and one General Staff Questionnaires envelope.

The staff of the units (or staff groups for self-contained classrooms) from which Grade 2 and Grade 5 students were selected for testing should receive two envelopes: one Unit Questionnaires envelope and one General Staff Questionnaires envelope. Such sets have been banded together for these staff members.

All other professional staff members (except those new in the building or assigned less than 1/3 time to the building) should receive one envelope: the General Staff Questionnaires envelope.

The Student Test Materials should be given to the unit staff (or staff groups for self-contained classrooms) from which the Grade 2 and Grade 5 students were selected for testing.

TO: Staff of Units Containing *Both* Grade 2 and Grade 5 Students

September 26, 1977

FROM: IGE Evaluation Staff

RE: Unit Staff Questionnaires

These questionnaires were originaliy designed for the typical school in which grade 2 and grade 5 students are in *different* units; therefore we have edited them slightly to fit your school's organization as *one* unit. Questions 63-72 must be answered twice; answers for Grade 2 should be placed in rows 63-72 of answer sheet D and answers for Grade 5 in rows 73-82.

TO:

FROM: IGE Evaluation Staff - Phase I

DATE:

For an accurate portrayal of IGE implementation in your school as well as nationally, it is important that information in the Phase I evaluation be comprehensive. Therefore, may we remind you that the following evaluation materials have not been returned:

A self-addressed envelope is enclosed for your convenience. If you have any questions or need replacement materials, please do not hesitate to call us collect at (608) 263-5548.

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November 22, 1977

Dear Principal,

One feature of Phase I of the Center's IGE Evaluation is providing participating schools with materials for refinement of their IGE programs. In September we asked that you choose one of three gift selections for your school in addition to Klausmeier, Rossmiller, and Saily's IGE Concepts and Practices.

We have not yet received your reply. Please read the enclosed descriptions, indicate your choice on the enclosed business reply card, and mail the card immediately. We must order materials no later than the beginning of December and want to include your choice in the order.

Cordially,

Thomas A. Romberg, Director
IGE Evaluation Project

TAR/lht

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the University of Wisconsin · 1025 West Johnson Street · Madison, Wisconsin 53706 · (608) 263-4200

December 30, 1977

MEMO

TO: Principals of schools in Phase I of the IGE Evaluation

FROM: Thomas A. Romberg TAR
Director, IGE Evaluation

RE: Status

Gifts

As you know, each participating school was invited to select one of three print materials in addition to Klausmeier, Rossmiller, and Saily's IGE Concepts and Practices. That book is enclosed. Book selections from the IGE Leadership Series will be mailed as soon as we receive them. Schools selecting either the Franklin Elementary School Simulation Series or the set of IGM print materials will find those materials enclosed at this time.

Reports of Results

You will receive both your school's results and a similar report of combined results from all participating schools. As can be expected in any large study, not all evaluation materials have yet been received at the Center due to a wide variety of events quite beyond the control of anyone involved. Thus, we cannot yet begin preparations on the combined report. Be assured, however, that analyzing and returning results to you is a high priority activity for us. We hope that you and your staff will find the results useful in planning for next school year.

TAR:ds

APPENDIX G

SPECIFICATION of
STAFF DATA PROBLEMS

the
Wisconsin
Research and Development Center
for Cognitive
Learning

the University of Wisconsin · 1025 West Johnson Street · Madison, Wisconsin 53706 · (608) 263-4200

March 13, 1978

TO: Craig Hougum
Phase I scaling group

FROM: Debbie Stewart

RE: Data cleanup, Forms A and B

From the listing you provided of forms with blocks of 10 or more blanks, we are developing a list of staff IDs by school whose responses should be eliminated from the analyses of separate instruments. The list below provides location and instrument numbers; the latter should probably be used to label the separate files.

Form	Instr	Items	Title
A	17	First 23	Staff Background
A	11	Last 77	Implementation Survey
B	52	First 50	Job Satisfaction
B	51	51st thru 78th	Schooling
B	53	Last 28	Learning and Knowledge

Some additional checks should be made before the instruments are put in separate files. First we need to know that each person completing (or whatever, depending on the upcoming list) an A form also made some entries on a B form and vice versa. Please provide a list of school and staff IDs for exceptions.

Further, for staff with first ID digit other than 1, is there a Form C as well as Forms A and B? Again, please provide a list of IDs for exceptions.

On the A form, principals can be identified by a response of 6 to the first Background item. Principals, sometimes more than one per school, should not have responded to items 1-10 of the Job Satisfaction instrument. Please (1) provide us with a list of the number of principals per school and (2) in each case change the first ten items on Job Satisfaction to blank if the items were answered.

Persons assigned to the school less than one-third time should not have responded to any instruments. We can identify them from their response of 0 to item 2 of the Background instrument. Please list for us and then omit from the file all forms for such persons.

d

	FORM A		FORM B		
	Staff Background	Implementation Survey	Job Satisfaction	Schooling	Learning & Knowledge
Instrument Number	17	11	52	51	53
School Sequence Number	Staff ID Number				
022				103	103
023		107			
033		119			
035		525			
061		115			
		117			
		118			
		540			
063		---	234		
		101			
		102			
		104			
		105			
		106			
		108			
		109	109		
		111			
		112			
		114			
		116			
		117			
		118			
		119			
		231			
		232			
		233			
071		129			
			134	134	
084	116				
	221				

	FORM A		FORM B		
	Staff Background	Implementation Survey	Job Satisfaction	Schooling	Learning & Knowledge
Instrument Number	17	11	52	51	53
School Sequence Number	Staff ID Number				
102		101			
		109			
		119			
		120			
		229			
		231			
105	102				
	218	218-12 items			
	219				
126		115			
				103	
153	118				
		119	119	119	119
				113	113
				114	114
172		113			
		525			
175			104		
177	523				
	524				
184		105			
		106			
		107			
214		107			
		108			
216		112			
		104			
217				208	208
219		106			
		107			
		519	519	519	519

	FORM A		FORM B		
	Staff Background	Implementation Survey	Job Satisfaction	Schooling	Learning & Knowledge
Instrument Number	17	11	52	51	53
School Sequence Number	Staff ID Number				
221				217	217
226		526-10 items			
240		111			
		243			
				112	112
249		111			
255		204			
264		103		103	103
		110		224	224
278		209-12 items			
		210			
281				522	522
284	221				
287				520	520
296				217	217
298		115			
321	216- last 5 items	216			
324		102			
		110		110	110
		113			
		120			
		122			
		123			
348		104			
354		206-15 items			
372		121			
		532			
				101	101

	FORM A		FORM B		
	Staff Background	Implementation Survey	Job Satisfaction	Schooling	Learning & Knowledge
Instrument Number	17	11	52	51	53
School Sequence Number	Staff ID Number				
376		113			
380		209	209	209	209
		512			
		514			
384	109-last 10 items				
		126			
	231				
		534			
394		251-14 items			
404					112
405	518-scattered 6 items	518	518	518	518
407	527				
				524	
426		103			
433	105				
		111			
447		104			
455			117		
471				115	115
484		125			
				230	230
486				522	
519		102			
520		109		109	109
533		126	126	126	126
				119	119
544		110			
		206			

	FORM A		FORM B		
	Staff Background	Implementation Survey	Job Satisfaction	Schooling	Learning & Knowledge
Instrument Number	17	11	52	51	53
School Sequence Number	Staff ID Number				
546				126	126
561				206	206-8 items
563		102			
567		104			
571	119				
582		113			
602		120			
		101			
626		118			
629	101				
645		120		120	
662		105			
		108	108	108	108
691		104			
694			582		

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17 April 1978

MEMORANDUM

TO: Phase I staff and Craig Hougum

FROM: Anne Buchanan

RE: Missing data, Form C, Grades 2 and 5, instruments 23, 24

I've divided the problems into 5 types as follows:

Type # 1: One or more subject areas (Reading and/or Math and/or LA) were not completed for instrument # 24 by the respondent. I assume the reasons are: (1) respondent specializes and/or is responsible for only one or two of the areas, (2) similarly, there is departmentalization, (3) unit teachers divided up the chore of responding by subject area, (4) after completing Reading, respondent decided to go no further, (5) in the case of omitting only LA (or only Reading), the unit (or respondent) does not distinguish between Reading and Language Arts.

Type #2a, 2b: For 2a, respondents evidently were unable or unwilling to do the percentage items in instrument 24. The rest of the questionnaires are in good order, generally.

For 2b, respondents completed all of the Reading items but then did only the percentage items for Math and LA. Evidently all percentages were calculated at once and entered, but then the remainder of the questionnaire was not completed. Was it assumed the other items would have the same responses for all three subject areas?

Type # 3: Here the Reading area of instrument 24 is again complete (usually) but it is difficult to make assumptions about the partially completed M and LA areas. Did the respondent answer only when M and LA differed from R?

Type # 4: In this case instrument 24 is in good order but instrument 23 (Role) is not. With the exception of items 1 and 2, can we just assume all others = 0?

Type # 5: Deletions.

All problems concerned with respondents in only one unit are bracketed and appear under the major problem type for the unit; this should allow us to meaningfully discuss the effect of throwing out data.

AB:eh

Problem Type #1

School Seq. #	ID	Form	# of respon-dents in unit	Instru-ment #	Type # 1 Missing data	Other Missing data
023	517	C	4	24	All Math; all LA	R48 *
035	219	C	3	23		4
				24	All LA	M73-M95
035	220	C	3	24	(L125-L135 only done--a type 2 problem)	L101-L124
102	228	C	2	24	All Math; all LA	R45-R55 = all 5's (?)
212	509	C	3	24	All Math; all LA	R45-R55
214	215	C	2	24	All Math; all LA	R52-R53
219	520	C	3	24	All R, M, LA	
219	521	C	3	24	All LA	
255	280	C	3	24	All LA	M73-M95
278	517	C	2	24	All Reading; all LA	
292	204	C	4	24	All R, M, LA	
298	534	C	3	23	All Math; all LA	5-8
				24		R39
298	535	C	3	24	All Reading; all M	L134
298	537	C	3	24	All Math	L134
301	531	C	6	24	All M, LA	R53-R55
321	216	C	6	24	All LA	M82-M95
373	221	C	3	23		6
				24	"All" M, LA	

Type #1 (Cont.)

School Seq. #	ID	Form	# of respon-dents in unit	Instru-ment #	Type # 1 Missing data	Other Missing data
						R53-R55
380	512	C	4	24	All Math	L128-9, L131, L134
380	513	C	4	24	All Math	
405	213	C	4	23		1-18
				24	All M, LA	R45-R55
412	204	C	4	24	All M, LA	
426	514	C	4	24	All LA	
426	519	C	4	24	All Math	
433	526	C	4	24	All Math	
433	528	C	4	24	Most of Math	
451	207	C	4	24	All M, LA	
451	208	C	4	24	All M, LA	
451	210	C	4	24	All M, LA	
451	214	C	4	24	All M, LA	R53
451	515	C	4	24	All M, LA	
451	516	C	4	24	All M, LA	
451	517	C	4	24	All M, LA	
451	518	C	4	24	All M, LA	
460	513	C	6	24	All M, LA	R45-R55= 9's
460	514	C	6	24	All M, LA	R45-R55= 9's
471	219	C	6	24	All M, LA	
507	218	C	6	24	All R, M, LA	
507	518	C	7	24	All R, M, LA	
520	204	C	1	24	All M, LA	
530	211	C	4	23		12-13
	211	C	4	24	All M, LA	
531	217	C	5	24	All LA	
533	280	C	5	24	All LA	
562	209	C	6	24	All LA	
582	521	C	3	24	All M, LA	
582	522	C	3	24	All M, LA	
582	523	C	3	24	All M, LA	

Type #1 (Cont.)

School Seq. #	ID	Form	# of respon-dents in unit	Instru-ment #	Type # 1 Missing data	Other Missing data
605	215	C	6	24	All M, LA	
629	209	C	1	23		(5-8)
				24	All M, LA	
629	514	C	1	23		(5-8)
				24	All M, LA	
633	212	C	1	24	All M, LA	
633	514	C	2	24	All R, M	
633	515	C	2	24	All R, LA	(M79)
				23		(10)
655	213	C	2	24	All LA	M61-M88
655	519	C	4	24	All LA	M82-M84
655	520	C	4	24	All LA	M83
694	577	C	3	24	All R, LA	
694	578	C	3	24	All M	

* Note: Circled items can reasonably be assumed to be = 0.

Problem Type #2a

School Seq. #	ID	Form	# of respon-dents in unit	Instru-ment #	Type # 2a Missing data	Other Missing data
071	540	C	5	24	R45-R55; M85-M95; L125-L135	
084	524	C	5	24	R49-R55; M85-M95; L125-L135	M79 L107-L108 L119
084	528	C	5	24	R45-R55; M85-M95; L125-L135	
153	524	C	4	24	M85-M95	
177	524	C	2	24	M85-M95	M82-M84
691	525	C	4	24	R45-R55; M85-M95; L125-L135	R44 M84

Problem Type #2b

126	243	C	2	24	M61-M88; L101-L128	
126	244	C	2	24	M61-M88; L101-L128	
127	225	C	3	24	M61-M84; L101-L124	
426	208	C	3	24 23	M61-M84; L101-L124	R54-R55 9-17
506	523	C	5	24	M61-M84; L101-L124 Note: Responses 85-95 must be moved from 88-98 area	
607	518	C	1	24	M61-M88; L101-L128	

Problem Type #3

School Seq. #	ID	Form	# of respon-dents in unit	Instru-ment #	Type # 3 Missing data
031	218	C	5	24	M82-M95; L116-L135
035	524	C	4	24	R27-8, R48-55, M67-8, M76-7, M89-95, L101-8, L129-135
				23	12-14
326	214	C	2	23	9-17
				24	M61-M66, M94-95, L101-106, L134
326	215	C	2	23, 24	(As ID 214 plus further omissions)
354	509	C	2	24	M76-M89, L116-L128
460	209	C	5	23	1,2
				24	R22-R23, M85-M95, L116-L135
520	580	C	2	24	R53, M76-M95, L125-135

Problem Type #4

School Seq. #	ID	Form	# of respon-dents in unit	Instru-ment #	Type # 4 Missing data	Other Missing data
063	231	C	1	23	9-18	
081	515	C	2	23	1-18 (all)	
221	521	C	4	23	1-18 (all)	
324	528	C	4	23	1-18 (all)	
433	218	C	3	23 24	1-18 (all)	R45
452	535	C	6	23	4-17 (but 3 = 1)	
567	525	C	4	23 24	9-18	R49-52, R55, M89-93, M95, L129-133)
639	216	C	6	23	1, 9-18	

Problem Type #5

School Seq. #	ID	Form	# of respon-dents in unit	Instru-ment #	Problem
102	229	C	4	23, 24	Blank
102	231	C	4	23, 24	Blank
372	229	C	5	23, 24	A few scattered responses
377	212	C	4	23, 24	Blank
405	518	C	3	23, 24	A few scattered responses
561	518	C	5	23, 24	A few scattered responses

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17 April 1978

MEMORANDUM

TO: Phase I staff and Craig Hougum

FROM: Anne Buchanan

RE: Missing data, Form D, Grades 2 and 5, instruments 22, 25, 26, 26b

Again, as for Form C, I divided the problems as follows:

Type # 1: By far the most common problem with the Unit Structure and Function questionnaire (form D, instruments 22, 25, 26, and 26b) is the omission of items 63-71 or the subset 69-71 (instruments 26 and 26b, or 26b, respectiv). I've called this problem Type # 1. Items 63-71 were t be answered for Grade 2 or Grade 5 only, as opposed to all the students in these units. My first hypothesis as to cause was that these units actually operate as self-contained classrooms and that the Grade 2 (or 5) teachers did not happen to be eligible to fill out the forms; I checked the staff background data, however, and had to throw this hypothesis out.

My second guess is that the units truly function as units (cross grade grouping) and thus found it difficult to answer 63-71 for Grade 2 (or 5) only. For those units which omitted only 69-71, I'd guess the question was too difficult or the unit does not think in terms of objectives.

At any rate, the omission of the items is disastrous for IE and ALT.

Type # 2: These units left out only a few critical items; it seems a shame to lose them. Possibly we could predict responses?

Type # 3: In this group are the forms which have only slight mechanical errors (i.e., response in wrong place) which can be repaired.

Type # 4: These forms (units) must probably be thrown out as there is a significant amount of missing data.

Problem Type #1

School Seq. #	Unit	Form	Instrument #	Type # 1 Missing data	Other Missing data
066	2	D	26	63-71	
066	5	D	26	71	
093	2	D	26	63-71	
172	5	D	26	63-71	22-26 Change ID 524→5
182	2	D	26	63-72	Change ID 218→2
182	5	D	26	63-71	36
221	2	D	26	70	56
257	2	D	26	71	
264	5	D	26	66-71	49-62
287	2	D	26	69-71	28, 62
287	5	D	26	69-71	4-26
293	2	D	26	69-71	
383	2	D	26	69-71	
426	2	D	26	69-71	59-62
506	2	D	26	69-71	
507	2	D	26	69	38-48
561	5	D	26	69-71	
563	2	D	26	69-71	
624	2	D	26	69-71	
633	2	D	26	63-72	29-37

Type #1 (Cont.)

Seq. #	Unit	Form	Instrument #	Type # 1 Missing data	Other Missing data
645	5	D	26	69-71	
648	2	D	26	69-71	
648	5	D	26	63-70, 72	Change 71 to 72
649	5	D	26	69-71	
655	2	D	26	68, 71	51-2, 55, 58, 60-1
694	2	D	26	69-71	62

Problem Type #2

Seq. #	Unit	Form	Instrument #	Type # 2 Missing Data	Other Missing Data
035	2	D	22	28	
			25	59	
102	2	D	25	52	
			22	38, 39	
255	2	D	22	22-26	
264	2	D	25	59	
377	2	D	25	56, 58	
377	5	D	25	58	
484	2	D	22	28	
507	5	D	22	22-26	
			25	53	
691	2	D	25	56-60	

Problem Type # 3

Seq. #	Unit	Form	Instrument #	Type # 3 Missing data	Other Missing data
022	2	D	22	38 = 2 (impossible) Change to 1	
061	2	D	22	38 = 0, but 39-48 answered. Change 38 = 1.	
071	2	D	--		Change ID 23-→2
212	5	D	--		Change ID 509-→5
394	5	D	--		Change ID 552-→5
476	2	D	--		Change ID 21-→2
530	2	D	22	7 = ϕ. Change to 1; file says they have unit leader.	
546	2	D	--		Change ID 218-→2

Problem Type #4

326	2	D	22, 25, 26, 26b	4-72 (!)	
699	5	D	22	1-48	

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17 April 1978

MEMORANDUM

TO: Phase I staff and Craig Hougum

FROM: Anne Buchanan

RE: Missing data, Form E, instruments 16,21

There is only one school (#284) with incomplete data: items 16-48 were omitted (instrument 21).

The following schools have no IIC so they legitimately omitted items 3-27 (instrument 21): 063, 102, 326, 351, 380, 390

APPENDIX H

SPECIFICATION of STUDENT DATA PROBLEMS

12/78

EXPLANATION KEY

COLUMNS ON SUMMARY SHEETS FOR GRADES 2 AND 5
PHASE I STUDENT DATA PROBLEMS

GRADE 2		SUMMARY SHEETS
?	=	Difficulty in categorizing further
SFTAA	=	Short Form Test of Academic Aptitude
CTBS 1R	=	Comprehensive Tests of Basic Skills -- Reading Vocabulary
CTBS 2R	=	Reading Comprehension: Sentences
CTBS 3R	=	Reading Comprehension: Passages
CTBS 7M[1]	=	Mathematics Computation
CTBS 8M	=	Mathematics Concepts & Applications
SOS	=	Self Observation Scales
LOC	=	Locus of Control

GRADE 5		SUMMARY SHEETS
?	=	Difficulty in categorizing further
SFTAA	=	Short Form Test of Academic Aptitude
CTBS 1R	=	Comprehensive Tests of Basic Skills -- Reading Vocabulary
CTBS 2R	=	Reading Comprehension
CTBS 6M	=	Mathematics Computation
CTBS 7M[2]	=	Mathematics Concepts & Applications
CTBS 3S[3]	=	Spelling
CAA-O[3]	=	Concept Attainment Abilities - Omelet test
CAA-NS[4]	=	Number Series
CAA-NR[4]	=	Number Relations
CAA-PCM[5]	=	Picture Class Memory
CAA-RCM[5]	=	Remembering Classes: Members
SOS	=	Self Observation Scales
LOC	=	Locus of Control

---

1 Has three separately-timed sections (addition, subtraction, and multiplication), but only a total score for the three sections is reported.

2 Although administered as a single test, separate scores are reported for Concepts (items 1-25) and Applications (items 26-50)

3 measures of word fluency

4 measures of numerical ability

5 measures of memory

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IGE EVALUATION PHASE I

SUMMARY OF GRADE 2 STUDENT DATA PROBLEMS

School	?	SFTAA	CTBS 1R	CTBS 2R	CTBS 3R	CTBS 7M	CTBS 8M	SOS	LOC
032						x			
063						x	x		
066			x	x					
*071	x					x			
093	x								
117						?		?	
*174						x			
175	x				x				
249						x			
284	x								
291							x		
296						x			
298	x								
301	x								
*304		x	x	x	x	x	x	x	x
336	x								
348	x								
351					?	?		?	
372						x	x		x
433						x			
520						x			

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School	?	SFTAA	CTBS 1R	CTBS 2R	CTBS 3R	CTBS 7M	CTBS 8M	SOS	LOC
546	x								
564					x		x		x
605	x								
645	x						x		
662	x								
691								x	x
735	x								
739					x				

* Was dropped from the staff data analyses

12/78

SCHOOL ID	GRADE 2 STUDENT DATA PROBLEMS -- IGE EVALUATION PHASE I
032	Didn't do multiplication subtest of CTBS Test 7M.
063	Multiplication subtest of CTBS 7M not administered; CTBS 8M not administered
066	No data for CTBS Tests 1 and 2. (Returned the CTBS Reading test books for Group A unused.)
071	SFTAA administered in December; CTBS, SOS, and LOC administered in January. CTB headers for SFTAA and CTBS have December 1977 marked as the test date for both. (?) Didn't do multiplication subtest of CTBS Test 7.
093	Group B: have 6 scores for SFTAA, 7 scores for CTBS 3R, and 6 scores for SOS, but these data are complete for only 5 students. See test group list in school folder. (?)
117	According to log-in notes, many of the tests for 7M were not completed. According to log-in notes, half-2/3 of the SOS response sheets had 5-6 randomly-marked Xs in circles--looked like the teacher finished marking items left blank by students.
174	No CTBS Test 7 data.
175	Students filled in their own birthdates on SFTAA test books. (?) Group B: Complete data for fewer than 6 -- have 5 SFTAA scores, 5 CTBS 3R scores, and 6 SOS scores.
249	6 of 8 students didn't do the multiplication subtest of CTBS Test 7.
284	Students tested came from 2 units at each grade level. (?)
291	Group C: Complete data for fewer than 6--have 5 SFTAA scores, 3 CTBS 8M scores, and 7 LOC scores
296	Didn't do multiplication subtest of CTBS Test 7.

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SCHOOL ID	GRADE 2 STUDENT DATA PROBLEMS -- IGE EVALUATION PHASE I
298	Students tested came from 2 units at each grade level. (?) Principal says he never received the test group lists. Phone call records in school folder indicate that at Grade 2 the teachers definitely selected the "top" 12-13 students from each homeroom for testing.(?)
301	Students tested came from 2 units at each grade level. (?)
304	No data--teachers "chose" to not administer the tests.
336	Only tested 6 out of the 12-13 per group. Principal said they tested the first 6 on each group list after crossing off names of students no longer there. However, based on logging in the tests, this only happened for Grade 2 Group A. Therefore, there was "selection" for testing. (?)
348	No clues about whether testing done in October or November. (?)
351	Complete data for fewer than 6 if data for 2 new students (001 and 013) not used--Group B of 2 groups.
372	Complete data for fewer than 6 if data for 2 new students in Group C (IDs 028 and 031) not used; affected are CTBS 8M and LOC. Only have 4 complete data sets for Group D--would be 5 if data for new student 030 were included; affected is CTBS 7M.
433	Fewer than 6 scores for CTBS 7M
520	No CTBS Test 7 data.
546	Tested in November. (?)
564	No data for CTBS Test 3, CTBS Test 8, or LOC
605	Tested in November. (?)

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SCHOOL ID	GRADE 2 STUDENT DATA PROBLEMS -- IGE EVALUATION PHASE I
645	Principal did not distribute the test group lists to the teachers-said she didn't realize she was supposed to. All students at Grade 2 were tested; all were in one unit. At Grade 2, children were alphabetized and then divided into test groups so that group 2A had kids at the beginning of the alphabet and group 2D had kids at the end of the alphabet, etc. (?) Group C: Complete data for fewer than 6--have 6 SFTAA scores, 5 CTBS 8M scores, and 6 LOC scores
662	Tested in November. (?)
691	No data for either the SOS or the LOC. These instruments were returned with a signed note from the principal indicating that the "Administration" had advised the school not to administer these in s truments.
735	Tested in November (?)
739	Fewer than 6 scores for CTBS 3R.

IGE EVALUATION PHASE I

SUMMARY OF GRADE 5 STUDENT DATA PROBLEMS

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School	?	SFTAA	CTBS 1R	CTBS 2R	CTBS 6M	CTBS 7M	CTBS 3S	CAA Tests O	CAA Tests NS	CAA Tests NR	CAA Tests PCM	CAA Tests RCM	SOS	LOC
*071	x							x						
076				x	x	x		x			x	x		x
102					x									
105	x									x				
*108	x		x		x			?				x		?
127													?	
*174						x					x			x
175						x					x			x
196									x	x				
226			x				x							
249			x			x	x						x	
284	x													
298	x													
301	x													
336	x		x				x							
348	x	x			x									
351												x		
354				x					x	x				
471									x	x				
546	x									1.				
564								x		x		x		
579		?	?				?							

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School	?	SFTAA	CTBS 1R	CTBS 2R	CTBS 6M	CTBS 7M	CTBS 3S	CAA Tests O	CAA Tests NS	CAA Tests NR	CAA Tests PCM	CAA Tests RCM	SOS	LOC
582			x				x						x	
584		?	?	?	?		?							
605	x													
607											?			?
633				x	x	x					?			?
639		?			?									
645	x		x			x	x				x		x	x
648			x				x							
662	x													
691	x												x	x
694	x													
735	x											x		
739				x	x	x			x	x				
745					x									

* Was dropped from the staff data analyses

SCHOOL ID	GRADE 5 STUDENT DATA PROBLEM -- IGE EVALUATION PHASE I
071	Testing done Nov. 28 - Dec. 1. CTB header has November 1977 marked as the test date. (?) No CAA--Omelet data
076	Only have 5 sets of complete scores each for CTBS 2R, CTBS 6M, CTBS 7M, CAA-O, CAA-PCM, CAA-RCM, and LOC. There is a sixth set of scores for CTBS 6M, but the set is incomplete--it includes the raw score and scale score but no anticipated achievement score because that student didn't take the SFTAA.
102	No data for CTBS Test 6.
105	According to log-in notes, there were lots of unfinished tests. (?) No CAA--Number Relations data.
108	According to log-in notes, there were lots of unfinished tests. (?) Have only 5 anticipated achievement scores for CTBS 1R and 6M because of incomplete SFTAA scores for student 005; have only 5 scores for CAA-RCM. No names or student IDs on CAA--Omelet or on LOC
127	According to the log-in notes, 8 of 10 students did not do the 2nd half of the SOS items. However, the SOS data results for this school are as normal as for any of the other schools.
174	Have only 5 scores each for CTBS 7M, CAA-PCM, and LOC
175	Group D: Have only 5 scores for CTBS 7M, CAA-PCM, and LOC; 1 of these 5 is a new student who assumed the ID 015
196	Have only 5 scores each for CAA-NS and CAA-NR.
226	Have only 5 scores each for CTBS 1R and CTBS 3S.
249	Have only 5 scores each for CTBS 1R, CTBS 3S, and SOS. No CTBS Test 7 data.

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SCHOOL ID	GRADE 5 STUDENT DATA PROBLEM -- IGE EVALUATION PHASE I
284	Students tested came from 2 units at each grade level. (?)
298	Students tested came from 2 units at each grade level. (?) Principal says he never received the test group lists. Phone call records in school folder indicate that at Grade 5 the teachers left out the real, real low kids, but wouldn't admit to handpicking the students tested. (?)
301	Students tested came from 2 units at each grade level. (?)
336	Only tested 6 out of 12-13 per group. Principal said they tested the first 6 on each group list after crossing off names of students no longer there. However, based on logging in the tests, this only happened for Grade 2 Group A. Therefore, there was "selection" for testing. (?) Only have 5 anticipated achievement scores for both CTBS 1R and CTBS 3S because student 014 did not do SFTAA Test 2.
348	Groups A, B, and C were tested in October; Croup D tested in November--header for CTB machine-scoring marked as October for all. (?) Since Group C did not do Test 3 of SFTAA, we do not have anticipated scores for CTBS 6M, but have only raw scores and scale scores.
351	Students answered only the first half of the items on CAA--Remembering Classes: Members.
354	Group B: have only 5 scores each for SFTAA, CTBS ??, CAA-NS, and CAA-NR.
471	Group B: complete data for fewer than 6 students--have 6 SFTAA scores, 6 CTBS 2R scores, 5 CAA-NS scores, and 5 CAA-NR scores.
546	Tested in November. (?) No data for CAA - Number Relations
564	No data for either CAA--Number Relations or CAA--Remembering Classes: Members. Only have 5 scores for CAA-Omelet.

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SCHOOL ID	GRADE 5 STUDENT DATA PROBLEM -- IGE EVALUATION PHASE I
579	According to log-in notes lots of test questions were left unanswered by Group A (their SFTAA, CTBS1R, and CTBS 3S).
582	Group A: Only have 5 scores each for SFTAA, CTBS 1R, CTBS 3S, and SOS.
584	According to log-in notes, lots of test questions were left unanswered on SFTAA Test 1 by Groups A and B and on CTBS Test 6 by Group C.
605	Tested in November. (?)
607	This school tested 12 new students, IDs 900-911, across the groups. Answer sheets for these 12 for the CAA and LOC tests do not have the ID coded; IDs for these 12 are coded only on the SOS and CTBS-SFTAA. Except for possibly Group D, group size will not drop to fewer than 6 with elimination of the data for these new students from the analyses. Group D: It looks as though 1 new student from Group A, 2 new students from Group B, and 2 new students in Group D were administered the CAA test and LOC assigned to Group D. Therefore, this group may have complete data for fewer than 6 if data for the new students are not used.
633	No data for CTBS Tests 2, 6, and 7. They administered CTBS Tests 1 and 3 to all groups. Furthermore, they returned a CTBS Level 3 Manual, so we don't know which manual was used to administer CTBS Tests 1 and 3, ours (with directions for CTBS Level 2), or the Level 3 manual they sent us. Their test results for CTBS Tests 1 and 3 look OK. May have complete data for fewer than 6--Group D (PCM and LOC).
639	According to log-in notes, lots of test questions were left unanswered by Group C on either or both the SFTAA and CTBS.
645	Principal did not distribute the test group lists to the teachers - said she didn't realize she was supposed to. All students at Grade 5 were tested; all were in one unit. At Grade 5, students were grouped for testing by homeroom, e.g. students in group 5A were all from the same homeroom, etc. (?) Group A: Only have data for 5 students for CTBS 1R, 3S, and SOS if data for new student (ID 027) are not used. Group D: Only have data for 5 students for CTBS 7M, CAA-PCM, and LOC if data for new student (ID 022) are not used.

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SCHOOL ID	GRADE 5 STUDENT DATA PROBLEM -- IGE EVALUATION PHASE I
648	Group A: Complete data for fewer than 6-- have 4 scores each for CTBS 1R and 3S and 6 scores for SOS
662	Tested in November. (?)
691	No data for either the SOS or the LOC. These instruments were returned with a signed note from the principal indicating that the "Administration" had advised the school not to administer these instruments. According to log-in notes, lots of questions were left unanswered on the SFTAA. (?)
694	Lots of questions left unanswered on the SFTAA and CTBS--Groups B and C. (?)
735	Tested in November. (?) Have only 5 scores for CAA-RCM.
739	Groups were not administered the tests to which they had been assigned, and several tests were not administered at all. There are no data for CTBS 6M, CAA--Number Series, and CAA--Number Relations. The SFTAA was administered to only 1 of the 4 groups; therefore, we have anticipated achievement scores only for CTBS 1R and CTBS 3S. We have only raw and standard scores for CTBS 2R and CTBS 7M.
745	Have only 5 scores for CTBS 6M.

the Wisconsin Research and Development Center for Cognitive Learning

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M E M O R A N D U M

TO: Anne, Gary, Tom, Debbie DATE: April 6, 1978

FROM: Pam Pam

RE: Entries in Test Administrator Manuals Returned by Phase I Schools

Return Rate and Entries. The Phase I schools were requested to return the Test Administrator Manuals so that we could check their entries on a form provided at the end of each manual titled "Irregularities During Testing." For the CTBS timed tests, we also provided space within the directions for them to enter the clock time for starting and stopping a test. Below are percents for the two kinds of entries; the "% Returned" column provides some perspective.

Manual	(1) % Returned	(2) % with "Irregularities" entries	(3) % known entries for starting & stopping times for CTBS timed tests
2A	86.4	22.8	46.9 (CTBS Test 2)
2B	80.6	21.7	34.8 (CTBS Test 3)
2C	83.2	19.4	
2D	85.7	20.0	44.8 (CTBS Test 7)
5A	86.4	26.4	37.0 (CTBS Test 1) 35.2 (CTBS Test 3)
5B	80.1	31.0	41.6 (CTBS Test 2)
5C	85.1	32.8	32.7 (CTBS Test 6)
5D	85.8	24.4	32.5 (CTBS Test 7)

The percents were computed as follows. Column (1). Percents are based on the actual number of Manuals used. For example, an N of 140 was used for Manual 2D, because 140 of the 162 schools had four test groups at Grade 2. The remaining 22 schools had either one, or two, or three test groups at Grade 2. Of the 140 2D Manuals used, 120 (85.7%) were returned. Column (2). These percents are based on the number of Manuals returned. Column (3). These percents are based on the actual number of administrations of each test, regardless of the number of Manuals returned. For example, we know only 46.9% of the starting and stopping times for the 160 administrations of CTBS Test 2 at Grade 2.

Irregularities Entries. We have retained, for future reference, all of the "Irregularities During Testing" forms returned by the schools with entries. The paragraph below appeared in the "Preparation" section of each Manual:

" Irregularities During Testing. Any test administration may be marred by unforeseen irregularities. In some cases, these could invalidate the score of the test unit in which they occur as well as the total test score, not only for the individual student but for the whole test group. It is recommended that you note on RECORD FORM--IRREGULARITIES DURING TESTING (page 00) any irregularities involving individual students: for example, anyone marking multiple responses to test items, experiencing sudden illness, having to leave the room at times other than scheduled breaks, or becoming unduly disturbed by the test situation. In addition, you should identify on the RECORD FORM any student with language difficulties unrelated to intelligence, or anyone having a severe physical handicap that might in some way affect his or her performance on the test. You should also make note of any unusual interruptions or distractions such as a fire or disaster drill, excessive outside noise, visitors unexpectedly entering the testing room, etc. This record should be returned to the R & D Center. "

The following were typical kinds of entries for whole test groups: excessive noise from halls, adjoining rooms, outdoors; interruptions; distractions; visitors; firedrills; the first day of snow; announcements over the school PA system; alphabets posted in the front of the room which helped Grade 2 kids on the Sequence subtest of the SFTAA; SFTAA not administered all in one sitting as required; SFTAA took much longer to administer than the testing times given in the Manual (Grade 2). A number of Grade 2 teachers let us know that students don't get multiplication (last subtest of CTBS Test 7) until later in the year. The following were typical kinds of entries for individual students: couldn't understand or follow directions; very upset during test--crying, etc.; guessed at answers; marked multiple responses; had to go to the bathroom. Only one answer document was not processed for scoring because of the irregularity entry for that student.

Most of the entries present difficulties that we are unable to deal with. For example, we have no way of knowing whether excessive noise, announcements over the PA system, etc. during testing are a common occurrence for a particular school or not. We also have no way of knowing whether kids who left for the bathroom during a CTBS timed test were given compensatory time or not.

Page 14 was missing from all of the 5C Manuals. Copy for this page included the end of the directions for Test 2--Analogies and the beginning of the directions for Test 3--Sequences, SFTAA. This page was not missing, however, from Manuals 5A, 5B, and 5D. The SFTAA directions were identical in all the Manuals and a xerox of page 14 from another Manual was inserted in several of the 5C Manuals returned. Also, an abbreviated version of directions for Test 3 is printed in the student SFTAA test booklet. I don't know how we calculate the damage done by the missing page. Only one school did not administer SFTAA Test 3 to group 5C.

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M E M O R A N D U M

TO: Anne, Gary, Tom, Debbie DATE: April 10, 1978

FROM: Pam Pam

RE: Phase I Known Violations of CTBS Timed Tests, Grades 2 and 5

Attached are separate lists for Grade 2 and Grade 5 of schools that we know failed to observe the time limits for the CTBS timed tests. We know about these violations because of the starting and stopping time entries in the returned Manuals. The lists are not exhaustive; the percent known entries for starting and stopping times are not very good - see column (3) of accompanying April 6 memo.

Some of the pluses and minuses may simply reflect incorrect reading/recording of the actual clock time, particulary those that are either plus or minus by only a minute. Everyone finishing before the required stopping time may account for minuses. Pluses may reflect compensatory time for an interruption of some sort. Except where footnoted, none of the violations was explained in the Manuals these schools returned.

As you know, many of the CTBS summary scores for schools are wrong because of students taking (starting) tests to which they were not assigned. This fact needs to be kept in mind as you look at the mean scores for the total Phase I Grade 2 sample. The mean scores for the total are incorrect because of this, but I felt some kind of reference point was needed.

On the Grade 5 list, the summary scores are incorrect for only one school (footnoted). Summary scores for the total Phase I Grade 5 sample are not provided here because they're incorrect (as for Grade 2), and because the four summary scores for each school seemed to give sufficient information for evaluation of the time violation problem.

PHASE I KNOWN VIOLATIONS OF CTBS TIMED TESTS--GRADE 2

	Grade 2 CTBS Timed Tests		
	Test 2	Test 3	Test 7--Subtest
School	126	219	212
(+,- Minutes)	(+21)	(-1)	(+2) Multiplication (3)
Mean SS (1)	279	278	294 (4)
Mean RS (2)	16	12	16 (4)
School	238		278
(+, - Minutes)	(+3)		(-5) Addition
Mean SS	326		275
Mean RS	25		12
School	372		380
(+,- Minutes)	(+1)		(+1) Addition
Mean SS	313		271
Mean RS	22		11
School	418		428
(+, - Minutes)	(+1)		(-1) Subtraction
Mean SS	297		277
Mean RS	18		13
School			584
(+, - Minutes)			(+2) Multiplication
Mean SS			256
Mean RS			10

TOTAL GRADE 2
PHASE I SAMPLE:

Mean scale score	277	272	280
Mean raw score	14	11	13

(1) Scale score
(2) Raw score
(3) Subtest for which time violation occurred
(4) These are total test scores; scores are not reported separately for the three subtests.

PHASE I KNOWN VIOLATIONS OF CTBS TIMED TESTS--GRADE 5

	Grade 5 CTBS Timed Tests					
	Test 1	Test 2	Test 3	Test 6	Test 7 Concepts[d]	Test 7 Applic.[d]
School (+, - Minutes) 1 | 2 [a] / 3 | 4	507 (-5)[b] 469 | 27[c] 468 | 1	076 (+2) 502 | 30 508 | -5	234 (+1) 476 | 38 493 | -17	504 (+10) 416 | 28 425 | -8	076 430 | 14 458 | -27	076 (-2) 445 | 15 463 | -17
School (+, - Minutes) 1 | 2 / 3 | 4	584 (+1) 405 | 19 401 | 4	999 (-1) 487 | 29 470 | 17	418 (-1) 509 | 41 510 | 0	564 (-5) 402 | 26 420 | -17	105 443 | 15 416 | 27	105 (+10) 417 | 12 420 | -1
School (+, - Minutes) 1 | 2 / 3 | 4		447 (+5) 522 | 32 523 | 0	507 (-4)[b] 448 | 35 489 | -40		214 436 | 15 467 | -30	214 (-6) 481 | 17 476 | 5
School (+, - Minutes) 1 | 2 / 3 | 4					507 454 | 16 435 | 19	507 (-1) 462 | 16 443 | 20
School (+, - Minutes) 1 | 2 / 3 | 4					520 440 | 15 448 | -7	520 (-2) 450 | 15 453 | -2
School (+, - Minutes) 1 | 2 / 3 | 4					691 439 | 14 444 | -4	691 (+4) 452 | 14 451 | 1

a

(1) Scale Score	(2) Raw Score
(3) Antic. Scale Score	(4) Scale Score Diff.

b Teacher noted that students had finished.

c These scores include one student who wasn't supposed to take this test

d Concepts: Items 1-25; Applic: Items 26-50

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PHASE I NEW STUDENTS WHO ASSUMED OR WERE ASSIGNED AN 0 -- STUDENT ID

School ID	Grade	Student ID
175	5	015*
351	2	001*
	2	013*
	2	014
372	2	028*
	2	030*
	2	031*
	5	012
377	5	037
645	2	010
	2	024
	5	022*
	5	027*
739	5	018
	5	022
	5	026

* Referenced on the listing of specific student data problems. Deletion of data for student IDs without an * here shouldn't bring the group N to fewer than six.

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